Let Outlook help you manage e-mail, appointments, tasks, and contacts!

Peter G. Aitken

Microsoft® Outlook® 2007 Bible

Integrate Outlook's many powerful features

Schedule events and manage e-mail

Assign tasks and maintain calendars

The book you need to succeed!

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To my dear wife Maxine, whose support and understanding were crucial over the months it took to write this book. Thanks for the neck rubs!

About the Author

Peter G. Aitken has been writing about computers and programming for more than 15 years, with over 45 books to his credit and over 1.5 million copies in print. He has also contributed hundreds of articles and product reviews to magazines and web sites such as *Visual Developer Magazine*, *PC Magazine*, DevX, Microsoft Office Pro, Builder.com, and DevSource. Peter is the proprietor of PGA Consulting, providing custom application development and technical writing services to business, academia, and government since 1994.

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Contents at a Glance

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Introduction

Welcome to the Microsoft Outlook 2007 Bible. The goal of this book is to provide a complete guide to this popular and useful program and, modesty aside, we think that we have done a terrific job. The Outlook Bible covers Outlook from A to Z, from soup to nuts, so you can be confident that it includes the information you need. Whether you are an Outlook beginner or have experience with earlier versions of the program, this book is designed for you.

Whereas many other programs are devoted to a single task, Outlook is more like a Swiss Army knife. It provides, in a convenient integrated package, all of those tools that most everyone uses on a regular basis—email, a calendar and appointment book, a contacts list, and a to-do list, just to name the most popular components. These tools can be used independently but—and here's where the real power of Outlook comes into play—can also be integrated with each other to provide a sophisticated information and time management system.

There's no getting around it, however—such a powerful program is unavoidably complex. Although Microsoft has made every effort to make Outlook as intuitive and easy to use as possible, any user will benefit from a guide to the program's commands and features. That's where this book comes in.

Is This Book For You?

Like all books in the Bible series, the Outlook Bible is designed to provide a complete guide to the program while remaining accessible to users at all levels of experience. It is neither a simplistic beginner's guide that covers only the basics, nor is it a dense technical tome that can be understood only by nerds and gurus. If you need to learn the fundamentals, you'll find them clearly laid out with plenty of illustrations and step-by-step instructions. When you are ready to dive deeper into Outlook's advanced features, you'll find that information at your fingertips. This book is appropriate for:

- The complete beginner who needs to install Outlook and get her email working as soon as possible.
- The person who has some experience with Outlook and now wants to explore the program's features in depth to use it to its full potential.
- The advanced user who needs to make use of VBA programming, forms, rules, and other of Outlook's more sophisticated abilities.

How This Book Is Organized

This book has been structured to make it easy for you to find the information you want. You can read the book in order from start to finish, or you can jump around and read only those chapters of interest.

Part I starts at the beginning with an overview of Outlook's features. To get the most from any program, you have to know what's available! Then Outlook installation and the elements of the screen are explored.

Part II is devoted to what is probably the most popular part of Outlook—email. You'll learn how to set up your email account, create and send messages, use message attachments, and work with received messages. This part also shows you how to format email messages, how to insert tables and pictures in a message, set email options to work the way you want, and how to protect yourself against junk email.

Part III is all about managing information with Outlook. You'll learn how to use Outlook's sophisticated contacts manager and how to schedule appointments and meetings. This section also covers using notes to keep track of various kinds of information, maintaining a to-do list with the tasks feature, and using the journal to keep track of how you spend your time. Finally, you'll see how to use RSS feeds—a new feature in this version of Outlook—to create a customized view of information from a variety of sources.

Part IV shows you how to get the most out of Outlook. You'll learn how to use categories with all types of Outlook information, a great way to stay organized. You'll see how to use Outlook data files and folders to meet your needs, and how to customize the program and screen to suit the way you work. This section also covers security issues, a topic that no one should ignore. Finally, you'll see how Outlook can be integrated with other Office applications.

Part V delves into using Outlook to develop custom solutions for your messaging and information management needs. You'll learn how to write macros, using the VBA programming language and the Outlook Object Model to automate and customize many Outlook tasks. You'll also see how to design custom forms to provide data management capabilities that are precisely tailored to your needs.

Finally, Part VI explores using Outlook with Microsoft Exchange Server and with SharePoint Services.

Conventions Used in This Book

Many different organizational and typographical features throughout this book are designed to help you get the most of the information.

Whenever the author wants to bring something important to your attention the information will appear in a Caution, Note, Tip, or Warning.

CAUTION This information is important and is set off in a separate paragraph with a special icon. Cautions provide information about things to watch out for, whether simply inconvenient or potentially hazardous to your data or systems.

NOTE Notes provide additional, ancillary information that is helpful, but somewhat outside of the current presentation of information.

TIP Tips generally are used to provide information that can make your work easier—special shortcuts or methods for doing something easier than the norm.

WARNING The information Warnings provide advise you about the serious consequences of performing the procedure or activity described—whether to you, to your data, or to your hardware or software.

Part I

Getting Started

IN THIS PART

Chapter 1

Getting Started with Outlook

IN THIS CHAPTER

- Outlook overview
- Messaging
- Managing contacts
- Scheduling
- Organizing information
- Searching
- Reading news and other information

Outlook is one of the most widely used programs in the world. The latest version, called either Outlook 12 or Outlook 2007 (but simply *Outlook* from here on) takes a great program and makes it even better. What is it about Outlook that makes it the one indispensable program on many people's computers?

The way I look at it, Outlook is the digital version of a Swiss Army knife. It doesn't do just one or two things, it does a whole bunch of things — and equally important, it does them well. You may not need all of Outlook's capabilities, but it's a pretty sure bet that you need some of them.

How many people do you know who don't use email? That's one of Outlook's abilities. How about keeping track of contact information for friends, family, and business associates? That's another. Do you need to schedule meetings, appointments, and social engagements? Outlook can help. This is what makes Outlook so popular — it takes a bunch of commonly needed capabilities and rolls them together into a single well-designed and easy-to-use program.

The key concept here is *productivity*. Outlook is carefully designed to integrate information and tasks in a way that will save you time, errors, and headaches.

This chapter gets you started with Outlook by taking you on a quick tour of all the program features. I think this is the first step in learning any program — you need to know *what* it can do before learning *how* to do it! After a look at all the things you can do with Outlook, the chapter ends with some information about what's new in this version of Outlook.

No Instant Messaging?

Strictly speaking, Outlook by itself does not support instant messaging. You can, however, use Outlook in conjunction with any of several compatible IM services.

Even though you may already be addicted to email, here's a look at some of the reasons it is so popular and why Outlook is such a powerful email client:

- Fast — email messages are delivered nearly anywhere in the world almost instantly. Neither the post office nor FedEx can say that!
- Convenient — you can read email messages at your convenience, which is a lot better than being interrupted by the phone every five minutes.
- Free — there's no cost for sending or receiving messages. At most you'll pay a modest fee for your email account, but it's still a lot cheaper than long distance.
- Flexible — in addition to messages you can use email to send photos and other documents to friends, family, and business associates.
- Forms — Outlook lets you design email forms for exchanging specific information.
- Record keeping — Outlook provides powerful tools for organizing and archiving your received and sent messages.

Email is an important aspect of most people's work and personal lives. With Outlook you have a tool that lets you work with email in an efficient and intuitive manner.

Messaging

Who could survive in today's connected world without email? Messaging is at the heart of Outlook's capabilities, and you'll even find some people who use Outlook for email and nothing else — although that's a waste in my opinion. In Outlook, the term *messaging* refers specifically to email — Outlook does not work with instant messaging, chat, or other forms of electronic communication.

Managing Contacts

Information management is Outlook's other main focus, and managing your contacts is an important aspect of that. Outlook's contact management feature is really just a sophisticated address book, but it is designed to be extremely flexible. Figure 1.1 shows an Outlook contact form with an individual's information filled in. This information includes:

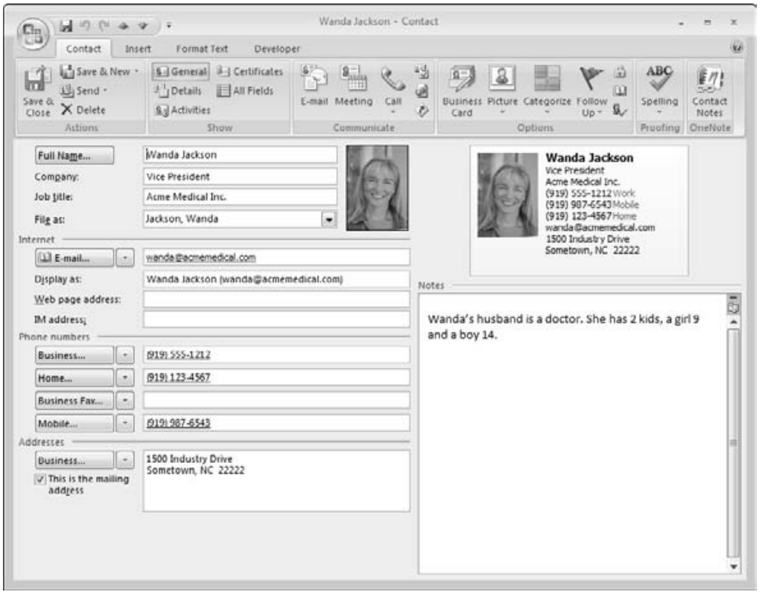
- Name, title, and company.
- Phone numbers for business, home, FAX, and mobile.
- Addresses (business, home, and other).
- A photo.

- Email addresses (as many as needed).
- Web page address.
- Instant messaging address.

Of course a contact entry need not include all this information — many will consist of just a name and email address. However, the capability to enter as much or as little information as needed provides you with great flexibility.

FIGURE 1.1

An Outlook contact can contain a wide variety of information.



The real beauty of Outlook contacts is that you can easily use and reuse the information in so many ways. This follows the philosophy that you should have to enter any piece of information just once and then be able to use it wherever and whenever it is needed. Among the things you can do with contact information are

- Address email messages.
- Print envelopes for postal mail.
- Automatically dial a contact's phone number (if your system is equipped with a dialer).
- Share contact information with other people.
- Associate contacts with tasks and schedules.

I am always finding new uses for Outlook contacts — it's a great tool.

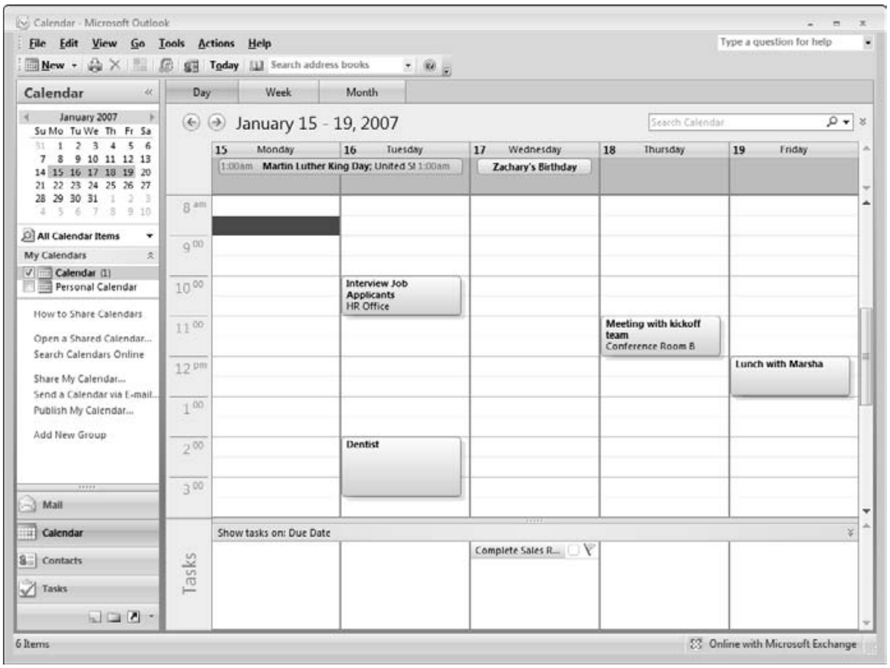
Scheduling

You say that you have a really busy life? That's a common complaint these days — everyone seems to have more and more to do. It's a lot easier if you can organize your time and find a way to keep track of important tasks. Outlook has two related features, the calendar and tasks, that can greatly simplify the job of managing your schedule.

Figure 1.2 shows Outlook's calendar display. This is a workweek display but you can customize it to show 7-day weeks, single days, or the entire month. The top section is the calendar per se, which shows appointments — items that have a specific start and end time. The lower section shows tasks, items on your to-do list that don't have a specific time frame associated with them (although they may have a due date).

FIGURE 1.2

Outlook's calendar displays both appointments and tasks.



Outlook's calendar is much more than a day-timer or similar paper appointment book. Some of its features are

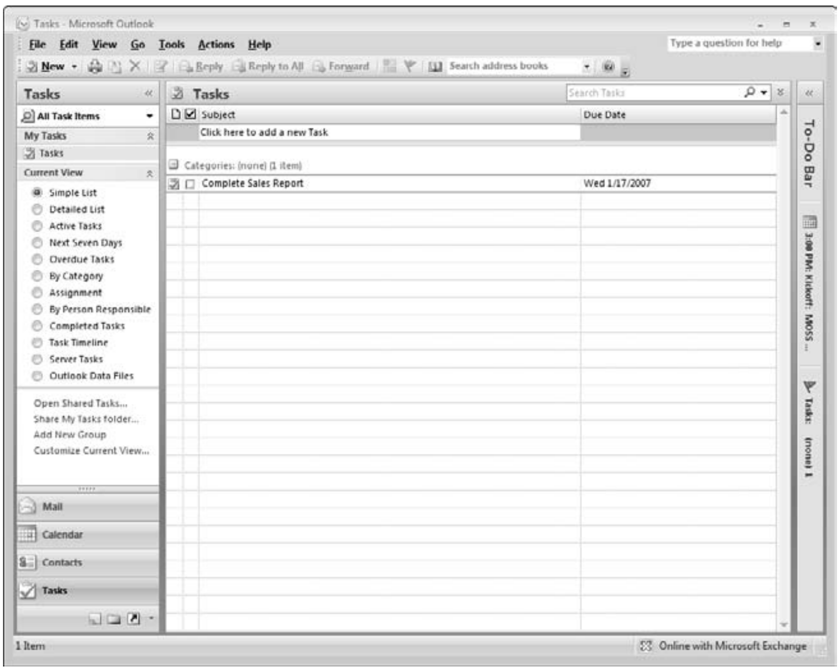
- You can easily schedule a recurring appointment such as the department meeting that is from 9:00 to 10:00 every 2nd Monday.
- You can have it remind you of appointments with a popup message on your screen.

- You can publish your calendar so that your coworkers can view your schedule and not plan meetings or other events when you are busy.
- You can view other people's published calendars when you are trying to schedule a meeting.
- You can use Outlook to invite people to meetings — and they can respond "yes" or "no" using Outlook as well.
- You can create a shared meeting workspace where you can share the agenda, other documents, and post meeting results.

Outlook's task feature is a really sophisticated to-do list. Each task has a start date and a due date and you can tell Outlook to remind you about the task if desired. Each task also has a priority — low, normal, or high — and a status that marks it as Not Started, In Progress, Completed, and so on. You can assign a task to someone else and receive a status report from them when the task is complete. You can view and organize tasks in almost any way you can imagine — overdue tasks, tasks due in the next week, active tasks, tasks assigned to a specific person or category, and so on. Figure 1.3 shows the Outlook task list with active tasks displayed.

FIGURE 1.3

Outlook can display your tasks in various ways.



What's more, Outlook has the ability to connect to tasks you have stored in other programs such as Microsoft Project, OneNote, or on a SharePoint Services account.

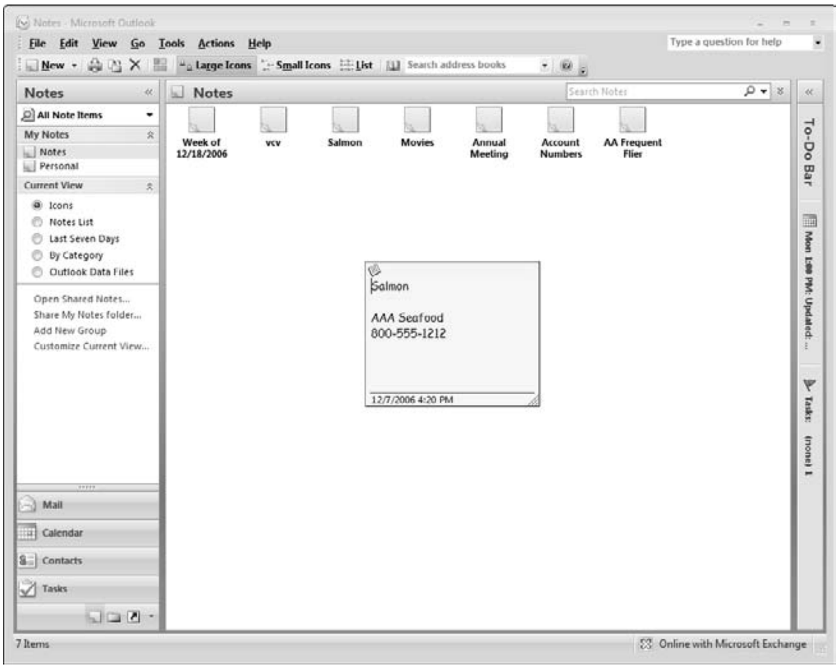
Managing Information

In addition to contacts and scheduling, Outlook has two other tools for keeping track of information.

Notes are a very simple means for storing small bits of information. I think of them as the computer equivalent of the sticky notes that lots of people have pasted on their monitor and refrigerator. I use notes for things like frequent flier account numbers, to remind me of that mail-order source for great seafood, to make notes about restaurants, and the like. Figure 1.4 shows Outlook's notes display with one note open. It's easy to forward notes to other people using email so you can share the information as desired.

FIGURE 1.4

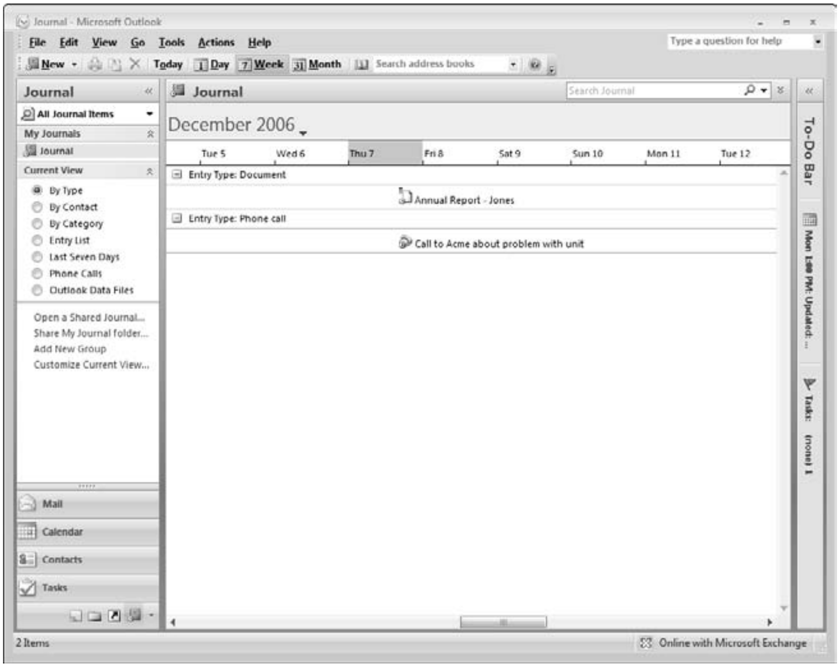
Outlook notes store small pieces of information.



The journal is a sophisticated tool for keeping track of various kinds of information. More specifically, the journal is primarily designed for keeping track of your various activities and the time you spend on them. You can use it to track things like phone calls, working on Office documents, email, and meeting requests. The journal can record certain things automatically and also allows for manual entries. Figure 1.5 shows the Outlook journal display with two items tracked, a phone call and time spent working on a Word document.

FIGURE 1.5

Journal entries keep track of the time spent on various activities.



Mobile Service

It's hard to imagine life before the advent of mobile phones. No matter how much you love your cell, you may love it even more once you team it up with Outlook Mobile Service. In a nutshell, Mobile Service lets you send text messages between Outlook and your mobile phone. When you are away from your computer, you can have task reminders, contact information, and daily calendar information sent right to your phone. You'll have no reason to ever miss an appointment again — even though you might want to!

Mobile Service requires that you register with an Outlook 2007 Mobile Service provider that works with your mobile phone company.

Categories

Outlook categories are not so much a tool in their own right, like email or the calendar, but they are a feature that can greatly simplify your use of Outlook. Essentially any of the items that Outlook works with, such as email messages, appointments, and tasks, can be assigned to a category. You can use Outlook's predefined categories or, like most users, create your own such as Work, Personal, and so on. Assigning categories to these items makes organizing them and finding needed information a whole lot easier.

Searching

Knowing that you have some information is one thing — and finding it can be something quite different! Outlook provides sophisticated search capabilities within all the various types of information it works with. Outlook lets you search by category, keyword, date, and other flexible criteria to locate items in email, tasks, and all the other kinds of information Outlook works with. Instant Search is integrated into Outlook so it is always available right when you need it.

Getting News and Other Information

Really Simple Syndication, or RSS, is a method for content publishers to make information available to subscribers. News, sports, blogs, weather — you name it and it is probably available via an RSS feed. Some other terms for RSS feeds are XML feeds, Web feeds, RSS channels, and syndicated content. RSS feeds are not new but the ability to read them in Outlook is.

Figure 1.6 shows the MSNBC Headlines RSS feed displayed in Outlook. In some ways an RSS feed works like email. Each "message" has a subject and content, and can contain links to other material as well. Outlook provides you with a list of RSS feeds you can subscribe to. You can also subscribe to other feeds as long as you have the required information.

Security

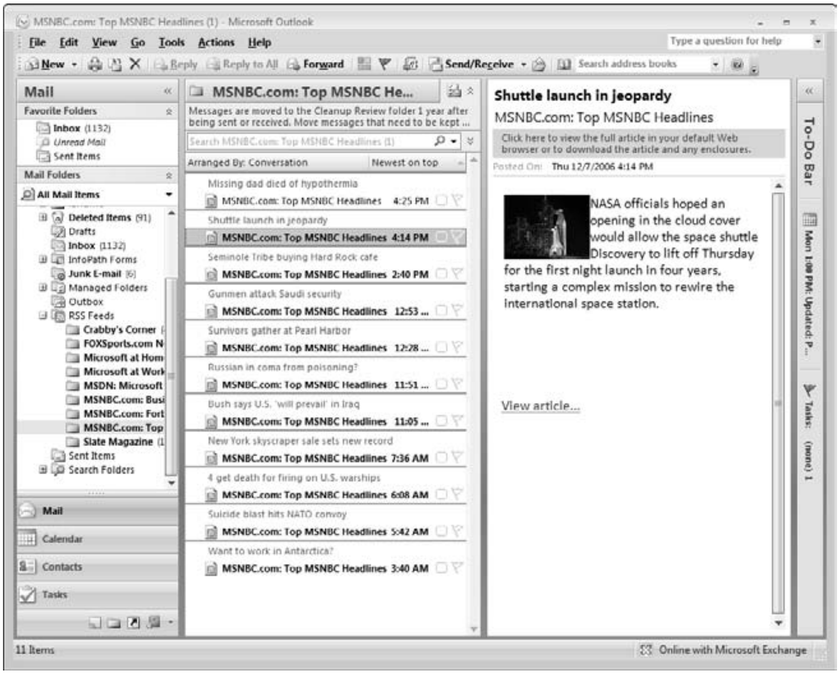
Unfortunately, security is an important concern these days. The term security encompasses a number of different things including the following:

- Protecting messages from prying eyes.
- Using digital signatures to guarantee identity.
- Preventing problems caused by malicious attachments and macro code.
- Avoiding infection by viruses and worms.

Although there is no foolproof security solution, Outlook provides a full set of tools that can help you to minimize your risks.

FIGURE 1.6

Viewing RSS feeds in Outlook.



Custom Solutions

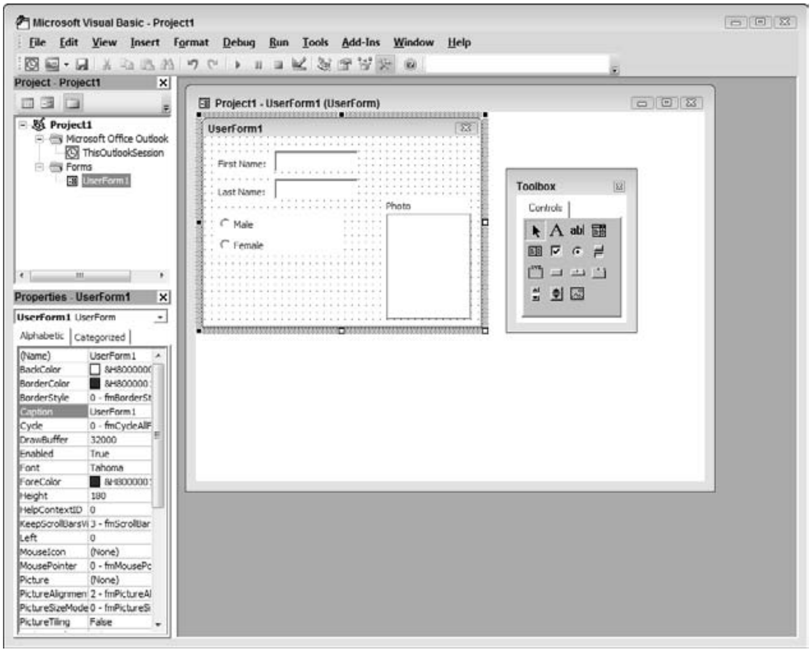
No matter how well designed it is, no application can be a perfect match for each user's individual needs. This is why Outlook provides several customization features that let you tailor it to the way you work and the tasks you need to perform.

One of these features is VBA programming. VBA stands for Visual Basic for Applications, sometimes just called Visual Basic. VBA is a powerful programming language that is built in to Outlook and the other Office programs such as Word and Excel. VBA provides the developer with access to all of Outlook's features and data. You can write programs, or macros, that automate tasks involving email, contacts, appointments, and so on. When there's an even modestly complex task that you perform regularly, automating it with a macro can save you both time and errors. Note that unlike some other Office programs Outlook does not allow you to record macros — you must program them manually — but once you understand the basic concepts it's not particularly difficult.

Another customization feature is userforms. A userform is, in essence, a dialog box that you have designed for the display and/or input of information. Used as part of a VBA macro, a userform provides data display and input that is customized for precisely what you need. Figure 1.7 shows a userform being designed in the form designer.

FIGURE 1.7

Designing a userform for custom data handling.



What's New

If you have used an earlier version of Outlook you will be glad to know that there have been no fundamental changes to the program. There is a new user interface, but most of the changes involve the addition of new features and enhancement of old ones. This section takes a look at the most important of these new and improved features.

New User Interface

Outlook's user interface has actually changed less than that of other Office programs. The main screen, shown in Figure 1.8, retains the main menu and the toolbar that were present in earlier versions of the program. The Outlook Today and folder views remain essentially unchanged as well.

Things are quite different, however, when you get to the windows you use to work with email messages, contacts, and so on. Microsoft has abandoned the menu and toolbar approach for a system of tabs and ribbons, as you can see in Figure 1.9. This figure shows an email window with four tabs across the top — Message, Insert, Options, and Format Text. Clicking a tab displays the associated ribbon, which provides access to buttons, menus, and dialog boxes for the related tasks.

The Outlook screen is covered in detail in Chapter 2.

FIGURE 1.8

The main Outlook screen retains the menu and toolbar of earlier versions.

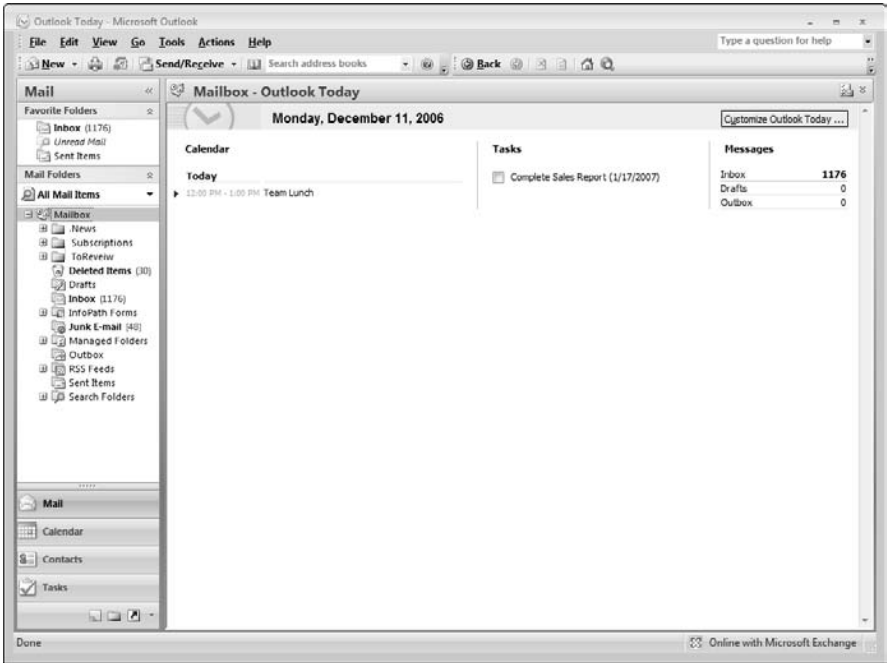
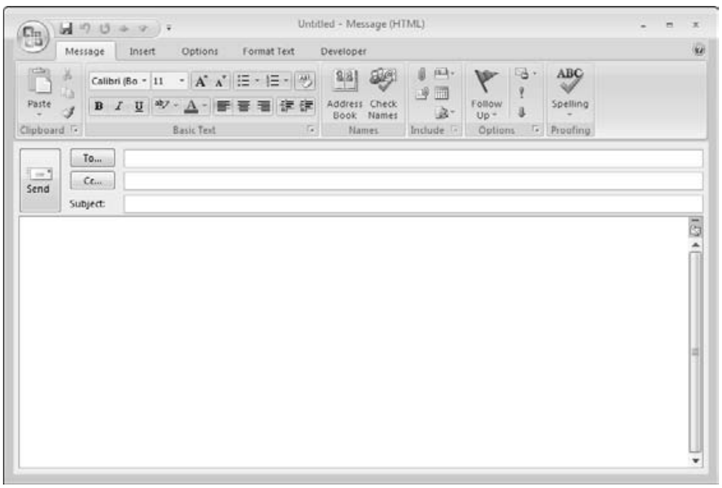


FIGURE 1.9

Other Outlook windows use the new tabs and ribbon look.



Instant Search

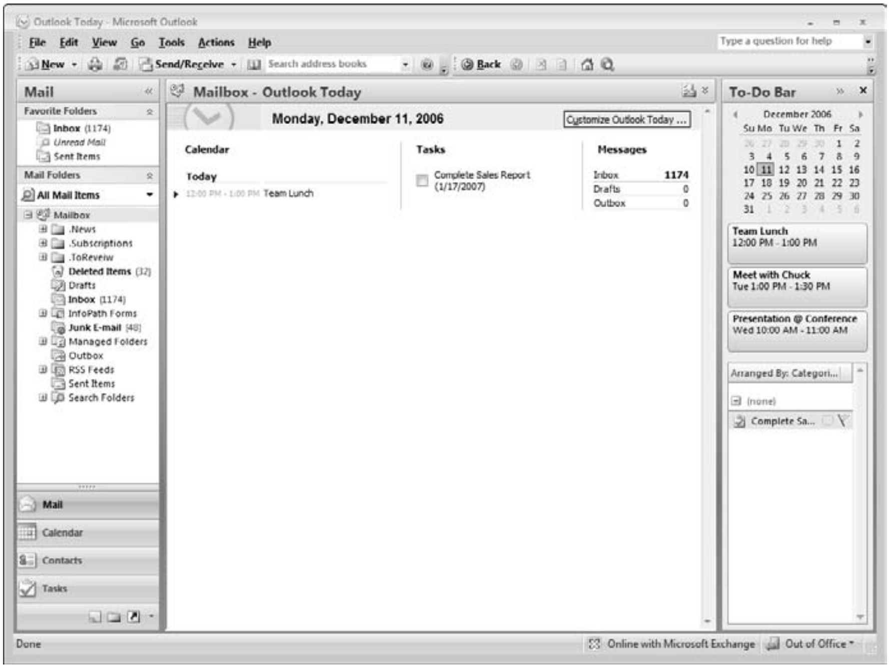
In a single step you can search through all your email messages, attachments, contacts, tasks, and calendars to find the information you are looking for.

To-Do Bar

The To-Do Bar, shown in Figure 1.10, provides a convenient, consolidated view of tasks, appointments, and emails that you have flagged for follow-up. You'll have no more excuses for forgetting something!

FIGURE 1.10

The To-Do Bar lets you view your daily priorities.



Color Categories

Outlook's categories are now coded by color. This makes it a lot easier to scan a list of items and pick out the high-priority ones.

Mail as Tasks

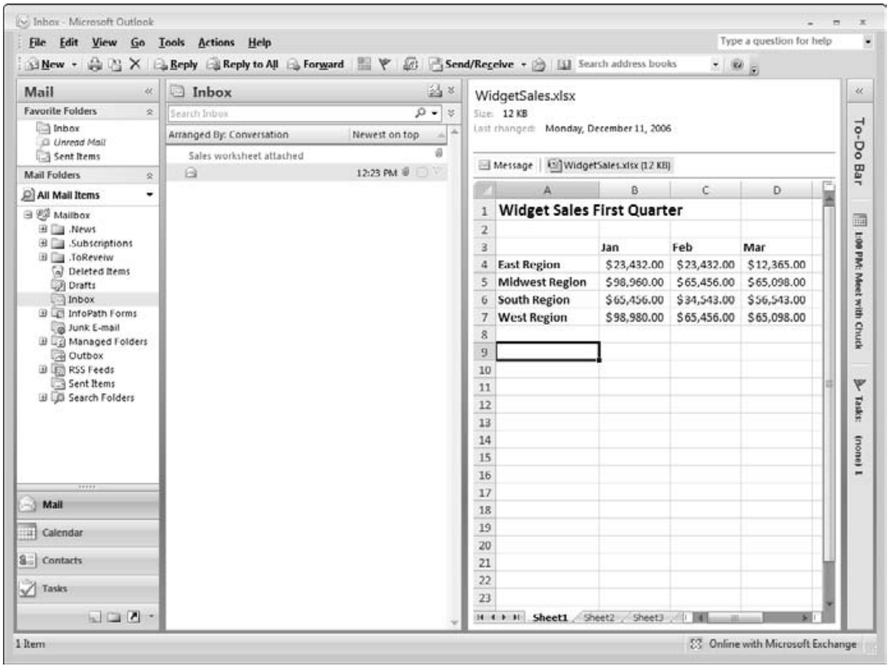
Outlook now lets you flag an email message as a task, greatly simplifying the process of defining a task based on a message you have received.

Attachment Previewer

No longer do you need to open an email attachment in its native application, such as Word or Excel, to see what it contains. This can save a lot of time because these native applications are often rather slow to open. In addition, the attachment previewer is safer because, unlike the native application, it cannot run any malicious macros that may be part of the document. Figure 1.11 shows an Excel workbook that was received as an email attachment being previewed.

FIGURE 1.11

The attachment previewer lets you view the content of email attachments without opening them.



Calendar Features

Several new capabilities make Outlook's calendar even more useful:

- Calendar publishing makes it easy to share your calendar information with others.
- Calendar snapshots let you share your calendar information with people outside your organization.
- Calendar overlay mode makes it possible to view multiple calendars at the same time.

RSS Feeds

Outlook now provides integrated RSS (Really Simple Syndication) capabilities. You can view RSS information just like you would email messages.

Automated Account Setup

For certain kinds of email accounts, Outlook now offers an automated account setup process that lets you set up your account with only your email address and password — no more searching around to find the email server addresses!

Anti-Spam and Anti-Phishing

New and improved anti-spam and anti-phishing tools help protect you from junk email and malicious messages.

Email Postmarks

The new email postmark feature is an anti-spam tool. A message you receive that is postmarked is less likely to be from a spammer and more likely to be from a legitimate source, and Outlook can take that into account when deciding which messages are spam and which are not. Likewise, if you postmark messages that you send, the recipients may be able to use the postmark to determine that your message is probably not spam.

Summary

This chapter has provided you with a quick overview of what Outlook can do for you. You have also taken a look at some of the features that are new and improved in the most recent version of Outlook. I think you'll agree that Outlook is a jack-of-all-trades, providing capabilities that almost everyone needs on a regular basis. With all this power, Outlook is unavoidably somewhat complex. The remainder of this book shows you the ins and outs of Outlook so that you will soon be putting this powerful program to work to simplify and organize your own busy life.

Chapter 2 looks at the basics of installing and using Outlook.

Chapter 2

Installing and Using Outlook

IN THIS CHAPTER

- Installing and activating Outlook
- Understanding the Outlook screen
- Using Outlook help

The first thing required before you start using Outlook is, of course, to install the program on your computer. This may have already been done for you, but if not there's nothing to worry about because it's a simple process. Next you should become familiar with the Outlook screen and the way you use the screen elements to accomplish tasks. If you have some computer experience this may seem like old hat to you, but given the changes to the user interface it might still be worth your while to give this section a quick look-over. Finally, this chapter takes a look at how you can use Outlook's online help to get detailed information about program operation.

Your Outlook Installation

Many users will already have Outlook installed on their computer. If you are using Outlook at your place of employment this will probably be the case, and even if it's not, you can be pretty sure that the IT department will want to do the installation themselves. Or perhaps you bought a new computer for use at home with Outlook already installed.

Seeing Whether Outlook Is Installed

If you are not sure whether Outlook is installed, follow these steps:

1. Click the Start button.
2. Click All Programs.
3. Click the Microsoft Office menu item.
4. On the final menu, look for a Microsoft Office Outlook 2007 menu item.

Office 2007 Already Installed?

If Office 2007 has already been installed, the first setup screen will offer these three options:

- **Add or Remove Features:** Select this option if you want to add features to or remove features from the Office installation.
- **Repair:** Select this option if one or more Office programs are not working properly. Repairing an Office installation fixes many, but not all, such problems.
- **Remove:** Removes the entire Office installation from the system.

If you can't find what you are looking for in step 3 or 4, Outlook has not been installed. The process is easy and is explained in the following section.

Installing Outlook

Outlook is almost always supplied on disks (CDs or DVDs) as part of a Microsoft Office System installation along with the other Office programs such as Word and Excel. Depending on your needs you can install just Outlook, the entire Office system, or any combination of programs you desire. This section deals specifically with the Outlook aspect of installation.

To begin installation, insert the Office 2007 CD into your CD drive. On most systems the setup program will start automatically. If it does not, follow these steps:

1. Open Windows Explorer.
2. Navigate to the CD drive.
3. Locate the file `setup.exe` in the root folder and double-click it.

The first setup screen, shown in Figure 2.1, asks you to enter your product key. You can skip this step and enter the key later if you wish.

Why Customize?

I recommend that you use a custom install only if you have a specific reason to do so and you are confident that you know how to make the correct choices. For example, you may not want to install all the Office programs to conserve disk space, or you may want to install program features that are not included in the default installation.

FIGURE 2.1

Entering the product key on the first setup screen.

The next setup screen gives you two of the following three choices:

- **Install Now:** This option is available if you do not have an earlier version of Office installed on your computer. Selecting this option will install Office 2007 with the default settings, which includes all the Office programs and the most commonly needed options.
- **Upgrade:** This option is available if the setup program detects an earlier version of Office installed on your computer. It allows you to replace the earlier version with Office 2007, using the default install choices. Many of the settings from the previous version of Office, such as email accounts, will be retained.
- **Customize:** This option lets you customize your Office 2007 installation as explained in more detail in the following text.

If you choose Install Now or Upgrade, the install process will complete automatically and notify you when it is complete. If you choose Customize, you will see the dialog box that is shown in Figure 2.2.

The Installation Options tab, shown in the figure, lets you specify which Office programs, and which components of each program, are installed. The initial settings here are the same as would be in effect for a default installation. If an item has a plus sign to the left, click it to expand the display to show sub-components. For example, Figure 2.3 shows the sub-components available for Outlook.

FIGURE 2.2

Specifying custom install options.

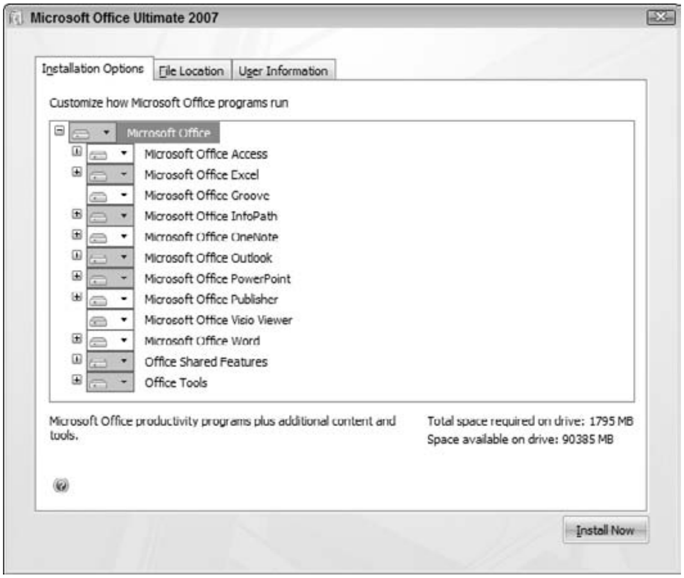
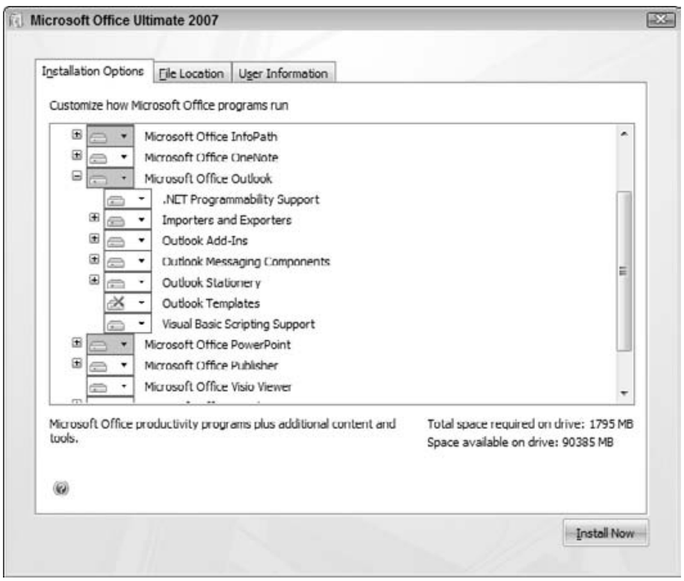


FIGURE 2.3

Installation options for Outlook.



Each item has a down arrow that you can click to change the install options for that item. These options are

- **Run From My Computer:** The item will be installed on your computer.
- **Run All From My Computer:** The item and all the sub-items listed under it will be installed on your computer.
- **Installed on First Use:** The item will not be installed until you try to use it for the first time. You may be prompted for the Office 2007 CD in this situation.
- **Not Available:** The item will not be installed.

The other two tabs in this dialog box are

- **File Location:** Specify the location where Office will be installed. This is normally `C:\Program Files\Microsoft Office` and should not be changed unless you have a definite reason to do so.
- **User Information:** Specify your name, initials, and organization for use by the Office programs.

Once you have finished customizing your Office installation, click the Install Now button to complete the installation.

Activating Outlook

Soon after you install Outlook, you must activate it in order to retain full functionality. Activation is Microsoft's way of preventing a single copy of Outlook from being installed and run on multiple systems in violation of the end-user license agreement.

To activate your Outlook installation, select Help, Activate Product and then follow the on-screen prompts. Activation requires an Internet connection. Though it's very unlikely that Outlook would ever be installed on a computer without an Internet connection, you can activate it by telephone if needed.

Checking for Updates

Microsoft makes product updates available for download from its web site. It's a good idea to stay current with updates because they can fix program bugs and security problems.

To check for updates, select Help, Check for Updates. This command will launch your web browser and navigate to Microsoft's update site. Follow the instructions on the update page to download and install updates.

Be aware that if you have the full Microsoft Office system installed, Outlook updates will be taken care of as part of Office updates. Also, if you have your Windows operating system configured for automatic updates, this process will be taken care of "behind the scenes" and you need not do it yourself. There's no harm in checking for updates, however — you will be informed if you already have the latest update installed.

The Outlook Screen

Outlook works with a lot of different kinds of information. There's no way that all the different kinds of information could be displayed on-screen at the same time, and anyway you would not want them to be — imagine the confusion! The Outlook user interface is designed to present information in a clear manner. Generally this means that only one or at most two kinds of information are displayed at a time. For example, if you are working with email, most of the Outlook screen will display email information such as message subjects and contents as well as buttons and commands for carrying out email-related tasks. When you switch to working with notes, the screen changes to show relevant information.

In addition, the Outlook screen can be customized to suit your preferences. This is covered in detail in Chapter 19. For now all you need to know is that the Outlook screen can take on many different appearances and that your screen may not look exactly like the images in this book. That's perfectly okay, and once you gain a little familiarity with the Outlook screen elements you will be able to find your way around like a pro.

The Menus

Like most Windows applications, Outlook has a menu bar at the top of the screen. It contains the top-level menus such as File, Edit, and View. You open a menu by clicking it or by pressing Alt + the access key, which is whatever letter is underlined in the menu name. A top-level menu command never performs an action on it own — rather, it displays a list of further commands from which you can choose — again, by clicking the item with the mouse or pressing the underlined access key (this time without Alt).

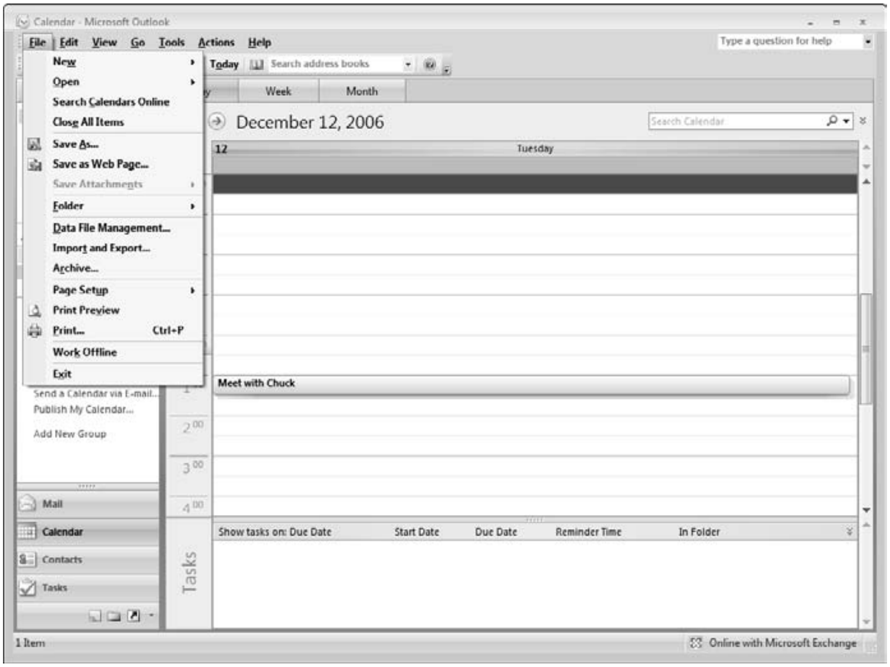
Figure 2.4 shows the open File menu. You can tell a lot about a menu command just by looking at it:

- If the item has a right-pointing arrow next to it, such as New in Figure 2.4, it means that selecting the menu item leads to yet another menu (which works just the same as the top-level menus).
- If the item has an ellipsis (...) next to it, like Save As, it means that selecting the menu item leads to a dialog box where you make entries and select options to complete the command.
- If the item has neither an arrow nor an ellipsis associated with it, it means that the command is carried out as soon as you select the menu item.
- If the item has a key combination next to it, such as Print, it means you can use this key combination — Ctrl+P in this case — to select the command without using the menus at all. This is sometimes called a *shortcut key*.
- If the item has an icon to the left, the icon identifies the toolbar button for the command.

Note that some menu commands turn something on or off. In this case the menu item will display a checkmark to its left when the item is on and no checkmark when it is off. If you have displayed a menu and then change your mind, press Esc or click anywhere outside the menu to close it.

FIGURE 2.4

Outlook's File menu.



Menu Options

Outlook's menus can be customized to suit your preferences. You can add and remove items, move items to a different menu, and even rearrange the order in which menu items appear. This kind of customization is covered in Chapter 19. There is, however, one menu-related option you should know about now.

Outlook can display either full menus or short menus. A short menu contains a subset of the full menu commands. The commands that appear on the short menus consist of a few most important commands plus the commands you have used most frequently. That's right, Outlook keeps track of your command usage and configures the menus accordingly. This can help reduce screen clutter. After all, if you rarely or never use a particular command, why take up screen real estate with it?

When a short menu is displayed there is an arrow at the bottom of it — click this arrow to open the full menu. You can also tell Outlook to automatically display the full menu after the short menu has been open for a brief period. These options are set on the Options tab of the Customize dialog box, which you display by selecting Tools, Customize and clicking the Options tab (see Figure 2.5). The options of interest are near the top:

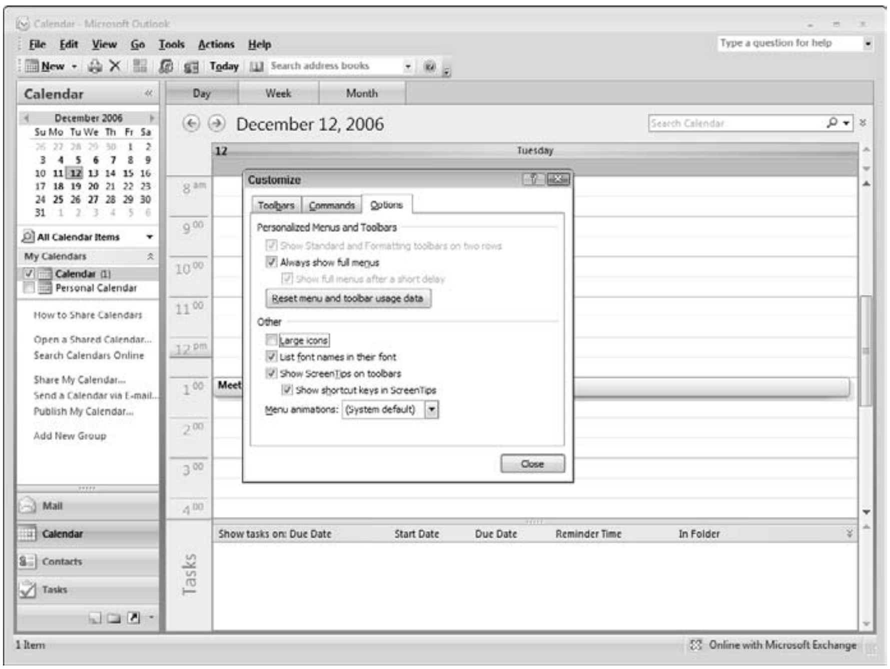
- **Always Show Full Menus:** Select this option if you want Outlook to always show all menu commands as soon as you open the menu.
- **Show Full Menus After a Short Delay:** Select this option if you want Outlook to show the short menu briefly and then show the full menu.
- **Reset Menu and Toolbar Usage Data:** Click this button to return the short menus to their default set of commands — in other words, to tell Outlook to forget which commands are your favorites.

The Toolbars

Outlook can display one or more toolbars directly below the main menu. Each toolbar contains buttons, lists, and other elements that provide access to commands that are relevant to the current situation. In other words, the content of the toolbars — some of them, anyway — changes as you move from task to task in Outlook. For example, when you are working on email there is a Reply button on the toolbar, but when you are working in the calendar there is not — because this command would not make sense. If you hover over a toolbar element — that is, rest the mouse pointer there without clicking — Outlook will display a *tooltip* at the mouse cursor describing the function of the element.

FIGURE 2.5

Customizing the way Outlook displays menus.



Menu Commands and This Book

The steps to carry out some action often involve menu commands. When I say *select File, Open* it means to open the File menu and then select the Open command. Whether you do this with the mouse or keyboard, or use the shortcut key instead of the menu, makes no difference.

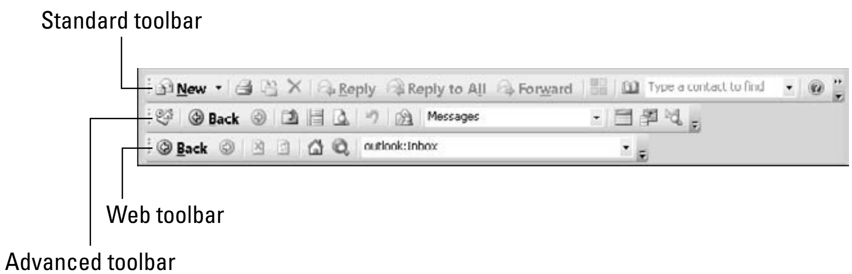
Figure 2.6 shows Outlook's three toolbars. This is how the toolbars look when you are working on email. The toolbars are

- **Standard:** Displays buttons for most frequently used commands.
- **Advanced:** Displays buttons for advanced commands that are needed less often.
- **Web:** Displays buttons for Web-related commands.

If the Outlook window is too narrow to show the entire toolbar, some of the buttons will be hidden. You can access these hidden buttons by clicking the down arrow at the right end of the toolbar.

FIGURE 2.6

Outlook's three toolbars.

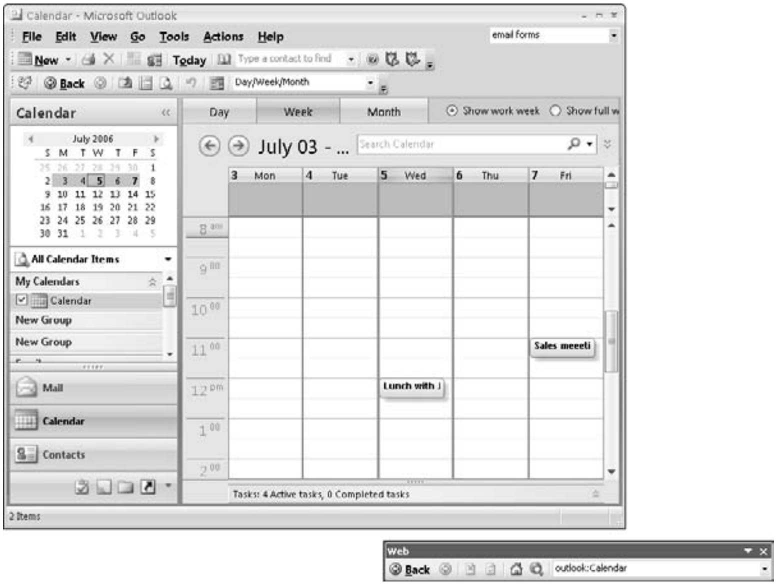


Note that at the left end of each toolbar is a vertical row of dots. You can point at these dots — the mouse cursor will change to a 4-headed arrow — and drag the toolbar to any desired location. You can dock the toolbar along any edge of the Outlook window. You can also display a toolbar as a free-floating window anywhere on the screen. Figure 2.7 shows the Web toolbar free-floating below the Outlook window. To move a free-floating toolbar, point at its title bar and drag.

To determine which toolbars are displayed, right-click any toolbar and on the menu that is displayed, shown in Figure 2.8, check or uncheck the toolbars as desired. The Customize command that you see on this menu is covered in Chapter 19.

FIGURE 2.7

Outlook can display its toolbars anywhere you want them.



Ribbons

Although Outlook's main window has retained the traditional menu and toolbar structure, other windows, such as the one you use to compose an email message, now use *ribbons*. A ribbon is sort of a combination menu and toolbar, designed to provide fast and intuitive access to commands.

Figure 2.9 shows a ribbon, in this case one of the ribbons in the compose message window. You should note the following things about ribbons:

- In most windows, a series of tabs provides access to different ribbons, each containing related commands.
- On a ribbon, elements are organized into related groups — in Figure 2.9, for example, there are Names, Include, and Options groups (among others).
- As you increase or decrease the size of the window, the ribbon adjusts to fit by displaying more or fewer items. When an item is hidden you can access it by clicking its group.
- Some groups display a Dialog Box Launcher, which you click to display a dialog box containing related options and commands.
- The Quick Access Toolbar is always visible, and provides a few frequently needed commands such as for saving or printing.
- Click the File menu button to display a menu of commands including file-related actions (Save, Open for example).

FIGURE 2.8

Specifying which toolbars to display.

The Navigation Pane

The navigation pane is displayed at the left side of the Outlook window. It is shown in Figure 2.10 and contains two sections:

- The bottom section displays buttons that you click to move to a different part of Outlook such as Mail or Contacts.
- The top section displays information relevant to what you are doing. In Figure 2.10 for example, Calendar has been selected so the top section of the navigation pane displays calendar-related items.

A Menu Tip

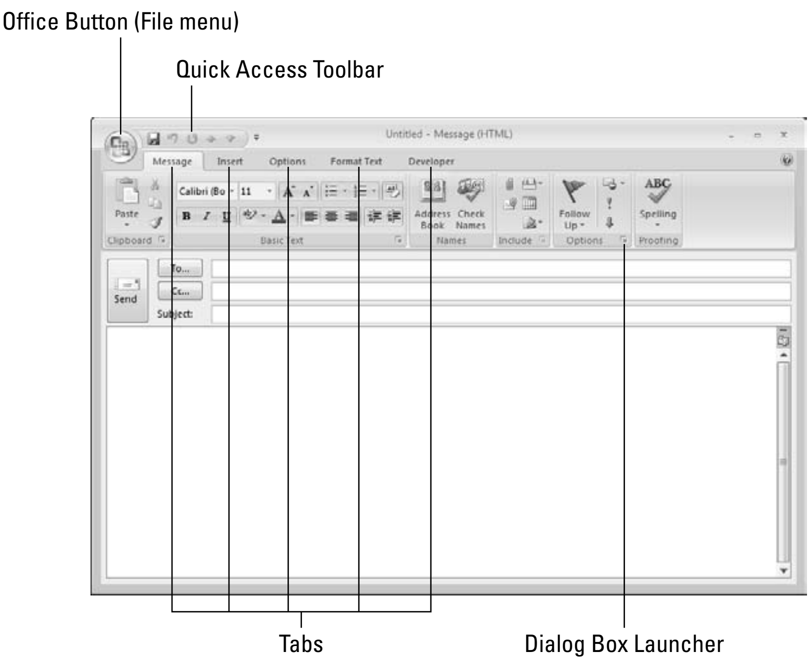
I suggest that you set the menu option to always display full menus, at least at the beginning while you are learning Outlook. This is the best way to learn what commands are available on the menus, even if you don't use all of them or understand what they do. Once you have gained some familiarity with the menus you can switch to short menus if you prefer.

Using Context Menus

Outlook provides at least two ways for you to accomplish many tasks. For example, there will be a menu command and also a ribbon button for some tasks. Many commands are also found on the *context menus* (also called *popup menus*). A context menu is displayed when you right-click many of the elements on the Outlook screen. They are called context menus because the commands that are displayed are related to the object you clicked. I will generally not mention context menu commands when describing how to perform tasks in Outlook — rather, I will focus on the other means that Outlook provides for doing things. You should remember, however, that the context menus are available — you may prefer using them.

FIGURE 2.9

Most Outlook windows present commands and options on ribbons.



The lower section of the navigation pane normally displays buttons for the seven main parts of Outlook: Mail, Calendar, Contacts, Tasks, Notes, Folder List, and Shortcuts. If the Outlook window is not tall enough to display all seven buttons, some of them are shown as small icons instead. In the figure, for example, Mail, Calendar, Contacts, and Tasks are displayed as buttons and Notes, Folder List, and Shortcuts are displayed as icons just below the Tasks button.

FIGURE 2.10

Outlook's navigation pane.

At the top-right corner of the navigation pane you'll see a left-pointing arrow. If you click this arrow the navigation pane will collapse to a narrow bar along the left edge of the window. You still have icons in the lower section to move around in Outlook, but the upper section is not visible. You collapse the navigation pane to provide more room for other screen elements. Click the arrow again — it is a right-pointing arrow when the pane is collapsed — to return to the normal navigation pane display.

The To-Do Bar

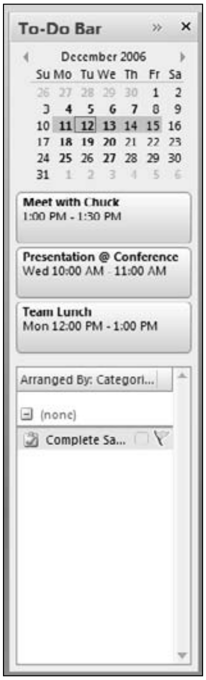
The To-Do Bar can be displayed along the right edge of the Outlook window, as shown in Figure 2.11. If it is not visible, you can display it by selecting View, To-Do Bar, Normal.

The use of the To-Do Bar is covered as needed in later chapters. For now it's enough to know these basics:

- To collapse the To-Do Bar, click the right-pointing arrow at the top. To re-expand a collapsed To-Do Bar, click the left-pointing arrow at the top.
- To hide the To-Do Bar, click the X icon at the top.

FIGURE 2.11

The To-Do Bar summarizes tasks and appointments.



The Work Area

The remainder of the Outlook screen is the work area. This area displays a wide variety of information depending on what you are doing in Outlook. It's here that you'll read email messages, view your appointments, and so on. Use of the work area is covered in later chapters that deal with specific aspects of Outlook functionality.

Resizing Screen Elements

Many of the elements on the Outlook screen can be resized. For example, you can make the navigation pane larger, but only at the expense of making the work area smaller. To resize an element, point at the blue line that separates it from another screen element — the mouse pointer will become a 2-headed arrow. Then, drag the border to the desired position. If you point at a border and the mouse pointer does not become a 2-headed arrow, it means that you cannot resize at that location.

Using Outlook Help

Outlook has an extensive help system that provides information about all aspects of the program. I like to think that after reading this book you'll never need to use the help system, but that's not realistic! The help system makes use of both online information, obtained from Microsoft's Office Online web site, and offline information that is installed on your computer.

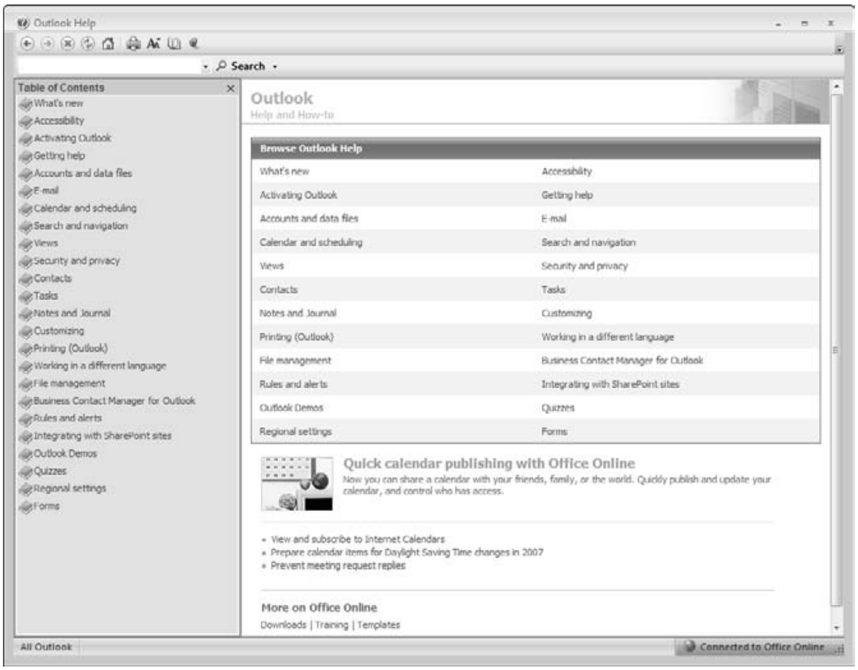
There are three ways to open help:

- Press F1.
- Click the ? icon displayed at the top right of many dialog boxes.
- Select Help, Microsoft Office Outlook Help.

The help window is shown in Figure 2.12 with the help home page displayed.

FIGURE 2.12

The Outlook help window.



The help window toolbar displays buttons for the following commands (left to right on the toolbar):

- **Back:** Returns to the most recently viewed help topic.
- **Forward:** Moves forward to the next help topic.
- **Stop:** Stops transferring information from online help.
- **Refresh:** Refreshes information from online help.
- **Home:** Displays the help home page.
- **Print:** Prints the current help topic.
- **Change Font Size:** Changes the font size used to display and print help information.
- **Show/Hide Table of Contents:** Displays or hides the table of contents.
- **Keep on Top:** If selected, the help window remains visible when you return to Outlook, enabling you to read help while you work. If not selected, the Outlook window will cover the help window.

Working with Topics

Outlook help, and in fact all Office help, is based on *topics*. A topic can be thought of as a single page of help information on a specific topic (although the material in some topics is much longer than one page).

Topics make use of hyperlinks, just like the web pages you are probably used to surfing. Clicking a hyperlink takes you to a different location in the same topic or sometimes to a different topic. As you move around between topics you can use the Back and Forward buttons in the toolbar to retrace your steps.

Using the Table of Contents

The table of contents is organized into *books*. Each book can contain topics as well as other books. If the table of contents is not displayed, click the Show Table of Contents button on the toolbar.

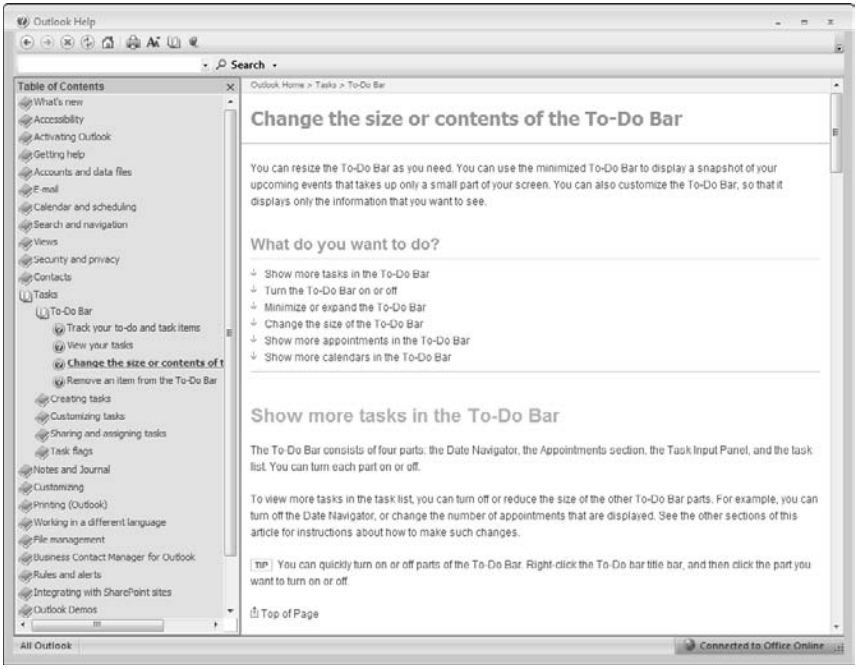
To expand a book in the table of contents, click it. Figure 2.13 shows the table of contents with the Tasks book expanded and the To-Do Bar book expanded. You can see that the To-Do Bar book contains three topics. Click the topic that you want to view. Click an expanded book to collapse it.

Using Search

Outlook help has a search tool that lets you search for information. It can be very useful when you cannot locate what you need in the table of contents. It is located just below the help toolbar. All you need to do is enter the search term in the box and click the Search button. Outlook displays a list of relevant topics, as shown in Figure 2.14 for a search on “email format.” Each item in this list is a link that you can click to view the topic.

FIGURE 2.13

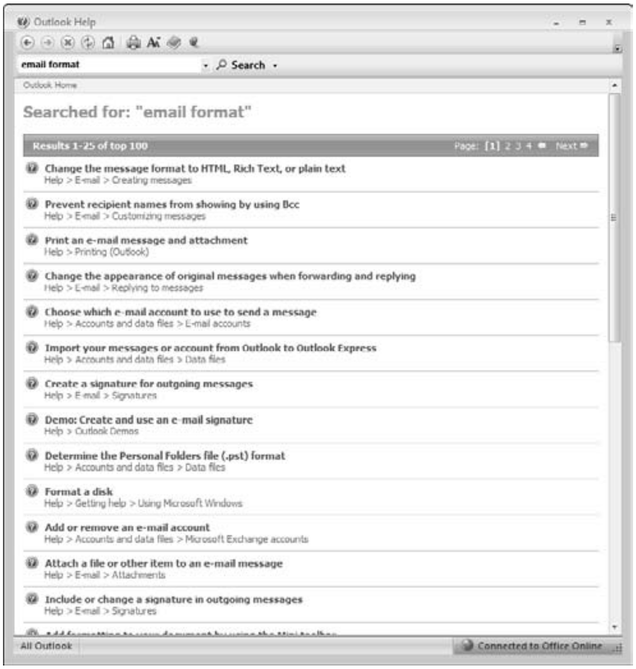
The table of contents displays books and topic titles.



If you click the arrow next to the Search button you will see a list of search options. These options let you specify what will be searched. For the most complete and wide-ranging information you should keep the default All Outlook selected. In special situations you may want to select one of the other options to narrow the scope of the search.

FIGURE 2.14

Displaying the results of a help search.



Summary

This chapter has shown you how to install and activate Outlook, steps that are required before you can start using the program. If the program has not already been installed on your system, you'll find that the needed steps are easy to follow.

The Outlook screen packs a lot of information into a relatively small space. It's important that you understand the various screen elements, what they do, and how to use them, including the help system. There are lots more details to come, but this chapter gave you a good foundation to build on.

In Chapter 3 you really dive into Outlook, starting with the fundamentals of sending and receiving email.

Part II

Working with Email

IN THIS PART

Chapter 3

Working with Email Accounts

IN THIS CHAPTER

- Understanding email accounts
- Setting up your email accounts
- Modifying account settings
- Using profiles

Before you can send and receive email using Outlook, you must set up at least one email account. When you set up an email account, you provide Outlook with the information it needs to connect to your online email account. Many people have just one account, but Outlook can work with multiple email accounts too.

Many people find that once their email account is set up they never have to make changes to the settings. Sometimes, however, making changes is required — and this chapter explains how to do this as well.

Setting Up Your Email Accounts

Before you can use Outlook to send and receive email, you must set your email account. You can have more than one account — you'll follow the same steps for each one. There are two parts to this.

First, your account must be set up on the server or at your ISP. This is not done in Outlook. If your account is at your workplace it will likely have been set up by an IT person and he or she will have provided you with the required information such as your email address and password. If you are setting up a home or small business account, you may be doing this yourself. The details depend on your ISP so I cannot provide instructions, but as part of the process you will either specify or be given your email address and password.

Second, you must set up your account in Outlook. This process provides Outlook with the information, such as your email address and password, that it needs to connect to your email server and send and receive messages.

Hotmail Accounts and Outlook

As of this writing you cannot use Outlook to connect to a free Hotmail account — you must have one of its subscription accounts. You will have to access your free Hotmail account using your web browser, as usual.

If you are at work you may be lucky enough to have your IT guru set up Outlook for you, in which case you can skip this section. If you must do it yourself, the minimum information you'll need is your email address and your password. You may also need to know the address, or URL, of your email server. The URL looks a lot like a web page address and will be something like `mail.hosting.com`. Some mail accounts require two addresses, one for incoming mail and another for outgoing mail.

Outlook supports several different kinds of email accounts, including a Microsoft Exchange Server account. The account setup process differs depending on whether you have an Exchange account, an HTTP account such as Hotmail or MSN, or one of the other supported account types (POP and IMAP). All these procedures are covered in the following sections.

Automatic Email Account Setup

Outlook can automatically configure some email accounts. This works for some but not all POP, IMAP, Exchange Server, or HTTP accounts. To use the automated email account setup feature, you need to have your email address and your password. Then, here are the steps to follow:

1. From the menu, select Tools, Account Settings to display the Account Settings dialog box. Make sure the E-mail tab is selected, as shown in Figure 3.1. If there are any email accounts already set up they will be listed here. If you're just getting started the list will be blank.
2. Click the New button to display the Add New E-mail Account dialog box (Figure 3.2). Make sure the Microsoft Exchange Server, POP3, IMAP, or HTTP option is selected, then click Next.
3. The next dialog box, shown in Figure 3.3, asks for three pieces of information:
   - Your name.
   - Your email address.
   - Your password.
4. After entering the information click Next. Outlook will try to connect to your email server and set up the account.

FIGURE 3.1

The Account Settings dialog box.

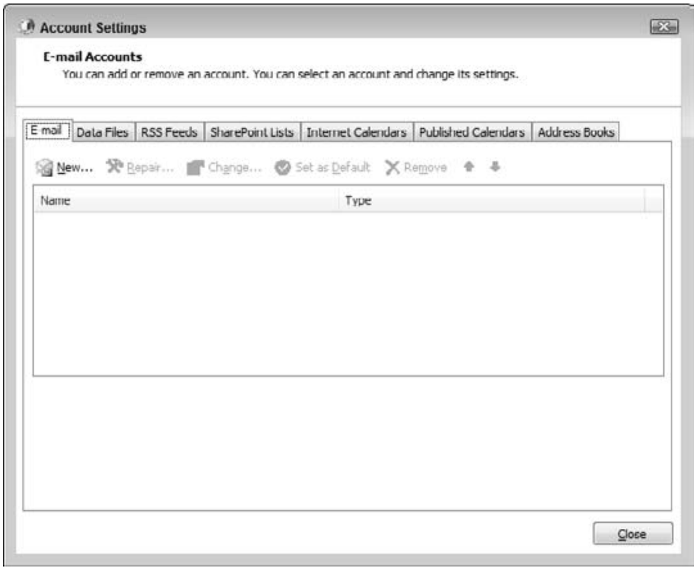


FIGURE 3.2

The Add New E-mail Account dialog box.

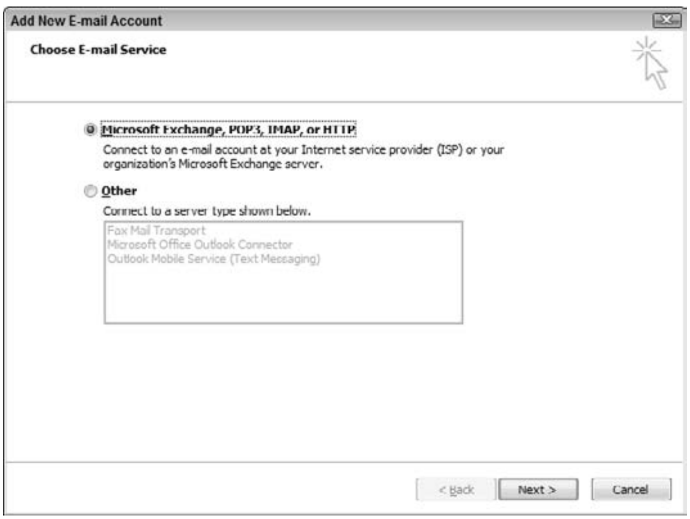
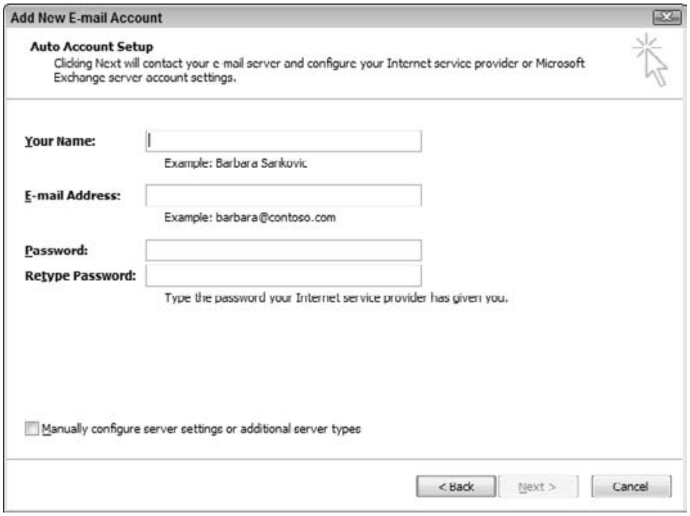


FIGURE 3.3

Entering your name, email address, and password during email account setup.



At step 3 you have the option of proceeding with manual account setup by selecting the Manually Configure Server Settings or Additional Server Types option and clicking Next. Manual email account setup is described for the various account types later in this chapter.

If you are continuing with automatic account setup, Outlook will attempt to connect to your email server and set up the account. In most cases this will work just as it is supposed to. The setup process will finish, the new account will be listed in the email accounts list, and you'll be able to start sending and receiving messages. However, this automated process does not always work. You may encounter one of the following situations:

- Outlook tells you that it cannot establish an encrypted connection to the server and offers to try again using an unencrypted connection. Click Next to proceed. The process will either complete properly or you'll encounter one of the other conditions in this list.
- Outlook cannot establish a connection to your account and asks you to verify the spelling of your email address. Make any needed corrections and click Next to try again. The process will either complete properly or you'll encounter the final condition in this list.
- If the preceding steps fail, Outlook will require that you manually configure the server settings. This option will be automatically selected in the Add New E-mail Account dialog box. Click Next to continue. The manual account setup steps differ for the various account types, and are covered in the following sections.

Email Terminology

All these acronyms can be confusing! POP stands for Post Office Protocol, a technology for receiving email. You'll also see POP3 used; they mean the same thing. IMAP is Internet Mail Access Protocol, another incoming mail technology. HTTP stands for Hypertext Transfer Protocol, which in addition to being a central technology for the Web is also used by some mail systems. SMTP is Simple Mail Transfer Protocol, the almost universally used technology for sending email.

Manual Email Account Setup (POP and IMAP)

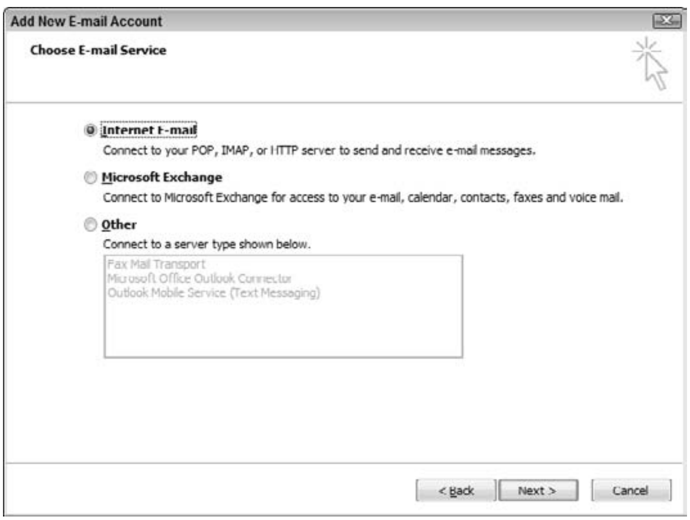
If automatic account setup does not work for your POP or IMAP account, you will have to do it manually. It's a bit more involved but nothing to be afraid of. You will need some more information in addition to your email address and password. This information should be available from your ISP or your IT person:

- The addresses of your incoming mail server and outgoing mail server. These may be the same but are usually different.
- The username and password for your account login.

Once you have this information you are ready to begin. The first dialog box in the manual account setup process is shown in Figure 3.4. You will arrive at this dialog box either if automatic setup failed, or if you explicitly selected manual account setup. Both of these are explained in the previous section, "Automatic Email Account Setup."

FIGURE 3.4

The first step for manual email account setup.

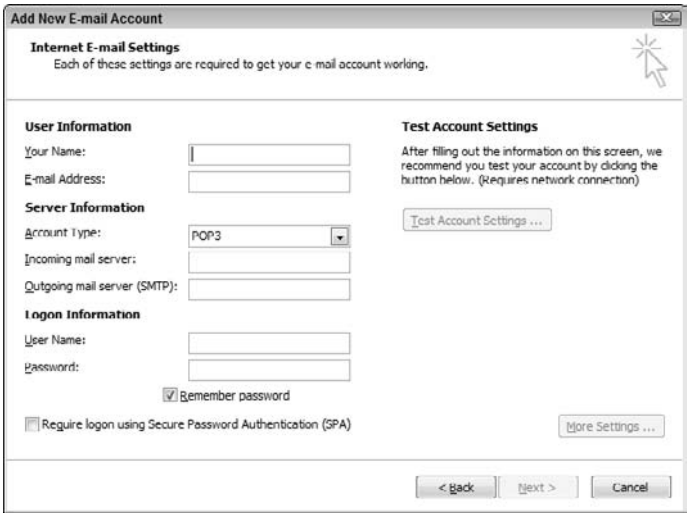


Here are the steps to follow:

1. Select the Internet E-mail option.
2. Click Next to display the dialog box shown in Figure 3.5. Enter all the requested information in the corresponding boxes, and be sure to select the type of email server from the Account Type list. The Remember Password option and Require Logon using Secure Password Authentication option are explained later in this chapter. Most people should leave these at their default settings. The More Settings button is also explained later in this chapter.
3. Once you have entered all the information, click the Test Account Settings button. If the test works, click Next and then Finish to complete the account setup. If the test does not work, please refer to the next section ("If Your Account Settings Don't Work") for steps to resolve the problem.

FIGURE 3.5

Entering required information for manual POP or IMAP email account setup.



There are two options available in the account setup dialog box. If you select the Remember Password option, Outlook will be able to automatically log on to your email account as needed. Otherwise you will be prompted for the password each time.

Secure Password Authentication, or SPA, is an additional level of security that some mail servers have implemented. If your server requires this you should have been told this and also given any additional credentials required for login.

If Your Account Settings Don't Work

It's not uncommon for email account settings to not work at first. When you click the Test Account Settings button, Outlook tries to log on to your incoming mail server and also to send a test message via your outgoing mail server. One or both of these tests may fail, and the results shown in the Test Account Settings dialog box (shown in Figure 3.6 after a failed test) will tell you the results. Note also that this dialog box has an Errors tab, shown in Figure 3.7. The information on this tab may give you a clue as to where the problem lies. For example, if the problem is reported as The Server Rejected Your Login, the problem almost surely lies with the username or password that you entered.

FIGURE 3.6

This dialog box displays the results of testing your email account settings.

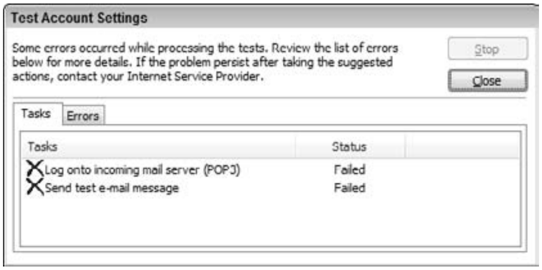
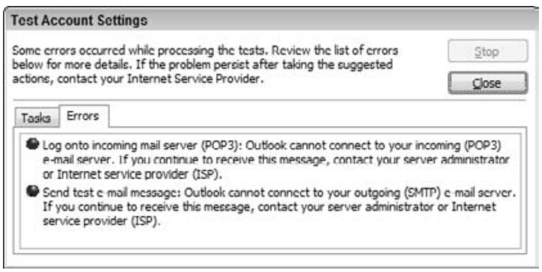


FIGURE 3.7

The Errors tab provides details on why the account settings test failed.



The most common cause of problems is simply mistyping some of the information required in the account setup dialog box. Everything must be 100% correct!

If the test failed in the outgoing mail server part, it most likely means that your outgoing mail server requires authentication. Setting this option is examined in the following section.

More Account Settings

The email account setup dialog box, shown in Figure 3.5, has a button labeled More Settings. You may not need to make any changes here, but if you do you can refer to this section for the details.

Clicking the More Settings button brings up the Internet E-mail Settings dialog box. This dialog box has four tabs for POP and IMAP accounts and a fifth for IMAP accounts only. The following sections look at these in turn.

General

The General tab, shown in Figure 3.8, has these three entries:

- **Mail Account:** This is the name Outlook uses to refer to the account, for example in the account list. The default is your email address but you can change it to anything you like such as Work Email or Yahoo Account.
- **Organization:** If you enter your organization name here it will be included in the headers of all email messages you send. Recipients normally do not see these headers, and Outlook does not make use of this information in any way. Other email programs may, however.
- **Reply E-mail:** When someone receives an email from you and replies by clicking the Reply button in their email program, their reply message will be sent to this address. By default it is the email address associated with the current email account, but if you have more than one email account you can enter another address here.

FIGURE 3.8

The General tab in the Internet E-mail Settings dialog box.

Outgoing Server

The Outgoing Server tab, shown in Figure 3.9, lets you specify authentication — that is, logon — settings for your outgoing mail server. By default this option is turned off because most outgoing mail servers do not require authentication. If yours does, put a check in the My Outgoing Server (SMTP) Requires Authentication box and then select other options and enter information as follows:

- **Use Same Settings as My Incoming Mail Server:** Outlook will log on to your outgoing mail server using the same username and password that you specified for your incoming mail server. This is the most commonly used setting.
- **Log On Using:** Select this option if your outgoing server requires its own log on. Then enter your username and password in the corresponding fields. The Remember Password option and the Require Secure Password Authentication (SPA) option work the same as was described for them in the previous section, "Manual Email Account Setup."
- **Log On to Incoming Mail Server before Sending Mail:** Select this option only if your incoming mail server is the same as your outgoing mail server. You will know this is the case when you are given the same address for both servers and enter this address for both during account setup.

FIGURE 3.9

The Outgoing Server tab in the Internet E-mail Settings dialog box.

Connection

The Connection tab, shown in Figure 3.10, lets you specify details of how Outlook connects to your email server. To set these options, you need to know how your computer is connected to the Internet. If you are at work, you almost surely connect via a local area network (LAN). If you are at

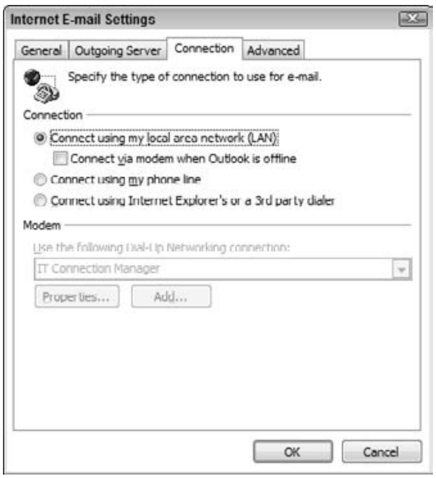
home and have a cable modem or DSL connection, including wireless connections, this is also a LAN. A dial-up or phone line connection is an older connection technology that is still in use by a lot of people.

If you are connected via a LAN, select the Connect Using My Local Area Network (LAN) option. If you select this option you can also select the Connect Via Modem when Outlook Is Offline option. Doing so will cause Outlook to use a dial-up connection (assuming that one is available) to connect when the LAN is not available.

If you connect via a modem (phone line), select the Connect Using My Phone Line option. You may already have a dial-up connection defined in Windows. If not, you must define one before you can use Outlook for email. Defining a dial-up network connection is a process that is part of the Windows operating system, not Outlook, and is beyond the scope of this book. Please refer to Windows online help for more information. If you select this option, you then must select the defined dial-up connection you want to use in the Modem section of the dialog box. You can use the Add button to add a new dial-up connection, and the Properties button to examine and modify the properties of an existing connection.

FIGURE 3.10

The Connection tab in the Internet E-mail Settings dialog box.



Advanced

The Advanced tab contains options that most people will never need to change. You may not be “most people,” however, so I explain these settings here. Note that the options available on this tab differ slightly for POP and IMAP accounts, as shown in Figures 3-11 and 3-12, respectively.

FIGURE 3.11

The Advanced tab for POP accounts in the Internet E-mail Settings dialog box.

FIGURE 3.12

The Advanced tab for IMAP accounts in the Internet E-mail Settings dialog box.

The advanced settings that are common to both POP and IMAP accounts are

- **Server Port Numbers, Incoming Server:** The default values are 110 for POP servers and 143 for IMAP servers. It's rare for a server to be set up on different ports, but if yours is you can enter the correct port numbers here.

- **Server Port Numbers, Outgoing Server:** Regardless of whether your incoming server is POP or IMAP, your outgoing server will be SMTP and the default port number is 25. Do not change this unless you know that your outgoing mail server uses a different port, a rare occurrence.
- **This Server Requires an Encrypted Connection (SSL):** Turn this option on for the incoming and/or outgoing mail server if required.
- **Server Timeouts:** This is the amount of time that Outlook will wait for the mail server to respond when retrieving/sending email. The default setting of 1 minute works fine in most cases. If you find Outlook timing out, it probably means that you are working over a slow connection or that your server is often busy. Try a longer timeout setting to resolve this problem.

If you are working with a POP account, you have several settings available that control how Outlook handles messages on the server:

- **Leave a Copy of Messages on the Server:** By default, messages that you have received are removed from the server as soon as they are downloaded to Outlook. Turn this option on if you want Outlook to leave the messages on the server after download. This can be useful if you will want to later retrieve your messages from another computer.
- **Remove from Server after ... Days:** Specifies how long messages are to be retained on the server after they have been downloaded.
- **Remove from Server when Deleted from 'Deleted Items':** A message will be retained on the server until you permanently delete it in Outlook.

If you are working with an IMAP account there is one unique option, Root Folder Path, which specifies the root folder of the mailbox. Normally you will leave this blank and Outlook will use the default root folder on the server. If you need to specify a different root folder, enter it here.

Folders

The Folders tab is available in the Internet E-mail Settings dialog box only for IMAP accounts. It lets you specify whether copies of sent mail should be stored in the default Sent Items folder or somewhere else. If you choose the latter option you can select the folder to use or create a new folder.

Downloading an Exchange Profile

Some Exchange account providers give you the option of downloading an Exchange profile file to your computer. When you run this file, it sets up the Exchange profile for you. If available, this is an easy and error-free way to set up an Exchange profile.

Only One Exchange Account

Whereas Outlook can support multiple email accounts, you can have only one Exchange account set up.

Manual Email Account Setup (Exchange Server)

If automatic account setup does not work for your Exchange account, you will have to exit Outlook and set up the account through the Windows Control Panel. Though some of the dialog boxes look the same, you cannot set up an Exchange account manually while Outlook is running. In order to complete this setup you will need to know the address of your Exchange server (or its NETBIOS name), the username that has been set up for you, and your password.

These are the steps to set up an Exchange account:

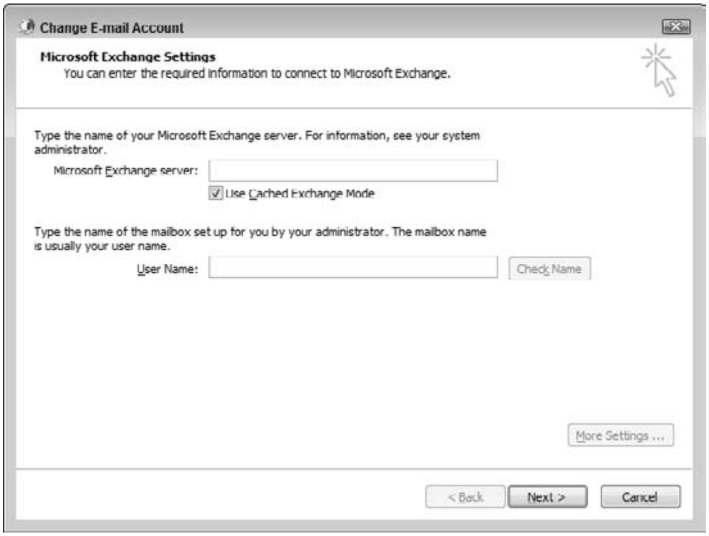
1. Make sure Outlook is not running.
2. Select Control Panel from the Windows Start menu.
3. Double-click the Mail icon to display the Mail Setup dialog box.
4. Click the E-mail Accounts button to open the Account Settings dialog box. This is the same dialog box that you see when setting up accounts from within Outlook (shown earlier in Figure 3.1).
5. On the E-mail tab, click the New button to display the Add New E-mail Account dialog box.
6. Make sure that the Microsoft Exchange, POP3, IMAP, or HTTP option is selected and click Next.
7. In the next dialog box, select the Manually Configure Server Settings option and click Next.
8. In the next dialog box, select the Microsoft Exchange option and click Next.
9. In the next dialog box, shown in Figure 3.13, enter your Exchange server address and username.
10. If a dialog box appears asking whether you want to continue, click OK.
11. Click Finish.

After setting up your account you can start Outlook. You will be prompted for the Exchange account password. If the connection is established Outlook will display “Connected to Microsoft Exchange” at the right end of the status bar (which is at the bottom of the Outlook window).

You learn more about working with an Exchange account in Chapter 28.

FIGURE 3.13

Entering information about your Exchange server and username.



The preceding steps should set up your Exchange account with the default settings. This may be fine for you, but you may also want to make some changes to the settings. These settings are explained in Chapter 28, "Using Outlook with Exchange Server."

Manual Email Account Setup (HTTP)

You have an HTTP mail account if you have signed up for email with either Hotmail or Microsoft Network (MSN). Other email providers may also have HTTP accounts that are compatible with Outlook. If so, they will have provided you with the information you need to set up the account when you signed up.

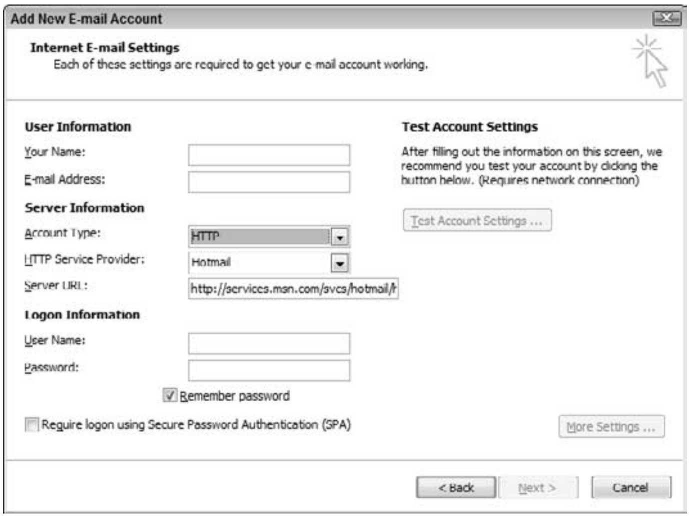
HTTP mail accounts are designed primarily for Web use — that is, you will use a browser such as Internet Explorer to log on to your email account and read and send messages. However, it can be useful to set up an Outlook account too so you can download and read mail in Outlook and use the program's various features to organize your messages. Be aware that not all HTTP email accounts are compatible with Outlook.

To set up your HTTP email account in Outlook you need your email address and password. If you are setting up an HTTP account that is not Hotmail or MSN you will also need to know the address (URL) of the mail server and your username. Then, follow these steps:

1. Select the Manually Configure Server Settings option in the dialog box (refer to Figure 3.3) and click Next.
2. In the next dialog box make sure the Internet E-mail option is selected, then click Next.
3. In the next dialog box, shown in Figure 3.14, enter your name, email address, username, and password. Make sure HTTP is selected in the Account Type list.
4. Select Hotmail, MSN, or Other in the HTTP Service Provider list.
5. If you selected Other in the preceding step, enter the URL of your HTTP email server in the provided box.
6. Click Next to complete account setup.

FIGURE 3.14

Entering information for manual HTTP mail account setup.



Modifying Account Settings

If you should need to change your account settings, the procedure is similar to setting up the account in the first place. Select Tools, Account Settings to display the Account Settings dialog box, and make sure the E-mail tab is displayed. Select the account of interest (necessary only if you have more than one) and click the Change button. You'll be taken through one or more dialog boxes where you can view and change the settings for this account. The settings will depend on the type of account and were explained earlier in this chapter in the section on setting up email accounts (Exchange server settings are covered in Chapter 28).

There are several other actions you can take with email accounts in the Account Settings dialog box:

- **Repair:** Outlook will try to connect to your email provider and refresh your account settings. This is the first step to try if an email account has suddenly stopped working.
- **Remove:** Deletes the account.
- **Set as Default:** If you have two or more email accounts, makes the selected account the default.

What exactly is the default email account? It's the account that is used to send email messages that you create from scratch. When you create an email message by replying to a message you have received, it will be sent using the account that the "reply to" message was received through. Note, however, that when you are composing an email message you can always change the account that the message will be sent through. This is explained in the next chapter.

Using Outlook Profiles

An Outlook profile stores information about a user's accounts and settings. All Outlook users have a single profile, and for most people that is all that is needed. In some circumstances, multiple profiles can be useful. This section explains how to create and use profiles in Outlook.

Understanding Profiles

In the first part of this chapter you learned how to set up your email accounts. Later chapters deal with configuring other aspects of Outlook such as RSS feeds and the screen appearance. All this information constitutes your profile. The vast majority of users never have a need for more than one profile, but there are situations where they can be useful:

- If you want to completely segregate two or more types of information, such as work and personal, you can create a profile for each.
- If you want to keep your regular POP and IMAP email accounts separate from an Exchange account.
- If more than one person uses the same computer, each person can have their own profile.

The third reason is usually a moot point because modern versions of Windows provide for different user accounts for logging on to Windows, which automatically gives each user their own Outlook profile. If, however, you want more than one person to use the same Windows logon and have separate Outlook data, you can use profiles.

Please note that creating an Outlook profile is not the same as creating a separate personal folders file. Although a given Outlook profile can have one or more personal folders files, each profile's folders are kept separate from other profiles.

Creating a New Profile

When you first install Outlook, a wizard walks you through the steps of creating a profile. To create a new profile you do not use Outlook but rather the Windows Control Panel, as follows:

1. Select Control Panel from the Windows Start menu.
2. Open Mail to display the Mail Setup - Outlook dialog box.
3. Click the Show Profiles button to open the Mail dialog box (Figure 3.15). This dialog box lists the existing profiles; the default profile is named Outlook.

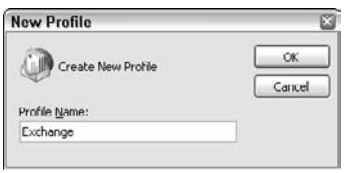
FIGURE 3.15

The Mail dialog box.

4. Click the Add button to open the New Profile dialog box (Figure 3.16).

FIGURE 3.16

Naming a new profile.



5. Enter a name for the new profile and click OK.
6. Follow the on-screen prompts to set up your email account. This procedure is covered earlier in this chapter.

Other actions you can take in the Mail dialog box are

- **Remove:** Removes the selected profile from the system.
- **Properties:** Lets you view and edit the properties of the profile, including the email account settings and data files. You learned how to work with email settings in Chapter ?? and data files in Chapter ??.
- **Copy:** Makes a copy of the selected profile under a new name. This is useful if you want a new profile that has some of the same settings as an existing one. Create a copy then edit it as needed.
- **Prompt for a Profile:** If this option is selected and you have more than one profile, Outlook will prompt you to select the profile you want to use each time the program starts.
- **Always use the Profile:** Select the profile that you want Outlook to use from the list.

Switching Profiles

You cannot switch from one profile to another while Outlook is running. If you selected the Prompt for a Profile option (as explained in the previous section), quit Outlook and restart it, then select the desired profile when prompted.

If you selected the Always Use this Profile option (also explained in the previous section), you must perform the following steps:

1. Quit Outlook.
2. Select Control Panel from the Windows Start menu.
3. From Control Panel, open Mail.
4. Click the Show Profiles button.
5. Select the Prompt for a Profile option.
6. Close all dialog boxes.
7. Start Outlook.

Summary

Setting up your email account — or accounts, as the case may be — is the first thing you must do if you want to use Outlook to send and receive email. Outlook supports several different kinds of accounts and you can be using one, two, or more different account types at the same time. Once you have your accounts set up and working, you can usually forget about them. Occasionally, however, you may need to modify some account settings and Outlook provides for that, too. Also, you can set up multiple Outlook profiles if you have the need.

Chapter 4

Fundamentals of Email

Outlook's email features are sophisticated and comprehensive. Underneath all that power, however, are the fundamental tasks of composing, sending, and reading messages. These basics are the subject of this chapter.

IN THIS CHAPTER

Composing and Sending Messages

This section explains the basics of composing and sending email messages.

Quick Compose and Send

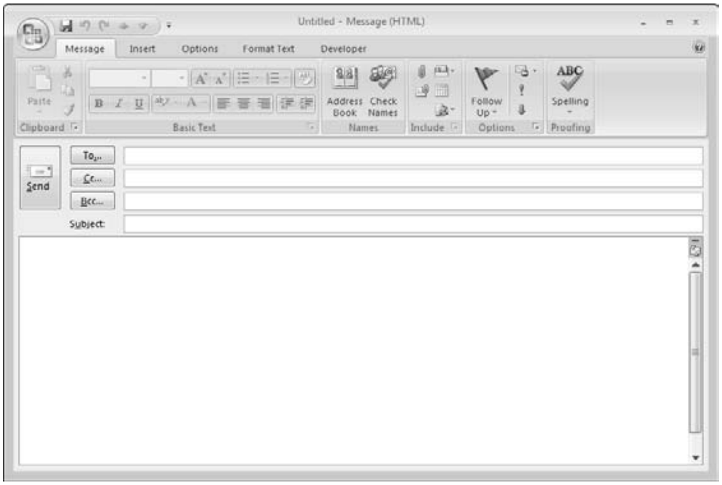
Outlook provides a lot of flexibility when it comes to creating and formatting email messages. Often, however, all you want to do is to quickly create and send a basic message. Here's how:

1. If the Mail pane is displayed, click the New button on the toolbar or press Ctrl+N to create a new, blank email message. If another pane is displayed, click the down arrow to the right of the New button and select Mail Message from the list. The new message appears as shown in Figure 4.1.
2. Type the recipient's address in the To field, or click the To button and select a recipient from your address book.
3. Type the message subject in the Subject field.

4. Type the body of the message in the main section of the message window.
5. Click the Send button.

FIGURE 4.1

A blank email message ready to be composed and sent.



That's all there is to it. Depending on Outlook's Send/Receive options, your message will be sent immediately or will be placed in the Outbox to be sent the next time a send/receive is performed. If you want to be sure the message is sent immediately, press F9.

You can also create a new email message using settings other than the defaults by selecting New Mail Message Using from the Actions menu. Then, from the next menu:

- To create a message based on stationery, select one of the recently used stationeries that are listed (if any) or select More Stationery to select from all available stationery. Stationery is covered in detail in Chapter 5.
- To create a message in a format (HTML, Rich Text, or plain text) other than the default, select the desired format. Message format options are covered in detail in Chapter 5.

Message Addressing Options

An email message can have multiple recipients, and each recipient can be one of three types:

- **To:** The main message recipient(s). Every message must have at least one recipient in the To field.

Sending a Message

When you click the Send button to send an email message, Outlook places the message in the Outbox. This is one of the mail folders displayed in the navigation pane. Depending on your connection status and Outlook option settings, the message may be transmitted to your email provider immediately or it may wait until your are online or until a timed send/receive occurs. In either case, once the message is sent it is removed from the Outbox folder and a copy is saved in the Sent Items folder.

- **CC (Carbon Copy):** Generally you use CC when a person needs to be aware of the content of the message but is not a primary recipient — that is, does not need to respond or take action. All recipients of a message can see who is in the CC list.
- **BCC (Blind Carbon Copy):** Like CC but the names and email addresses of BCC recipients are not visible to any other recipients of the message.

Changing the Reply To Address

By default, the reply to address that is part of every email message you send is the reply address that you specified when you set up the email account. There may be situations when you want replies to a message that you send directed to a different email address. To do so:

1. Click the Direct Replies To button in the More Options section of the Options ribbon. Outlook will open the Message Options dialog box.
2. Under Delivery Options, make sure the Have Replies Sent To option is checked.
3. Enter the desired reply address in the adjacent box, or click the Select Names button to choose from your address book.
4. Click OK.

Entering Recipients Manually

You can type recipients directly into the To, CC, and BCC fields. To enter more than one recipient in a field, use a semicolon as a separator between addresses.

Outlook's autocomplete feature is by default turned on for all recipient fields. As you start entering an address or name, Outlook displays suggestions based on what you have entered in the past. The suggestions come from a list of names and email addresses that you have entered previously. Outlook will narrow the list as you enter more of the name or address. If the recipient you want is displayed, select it by clicking. You can also highlight it with the up and down arrow keys and press Enter. Otherwise just continue typing in the full name or address.

Where's the BCC Field?

By default an email form does not display the BCC field in its header, just the To and CC fields. You can still add BCC recipients using the Contacts list, however. If you want the BCC field displayed, click the Options tab at the top of the message window and click the Show BCC button.

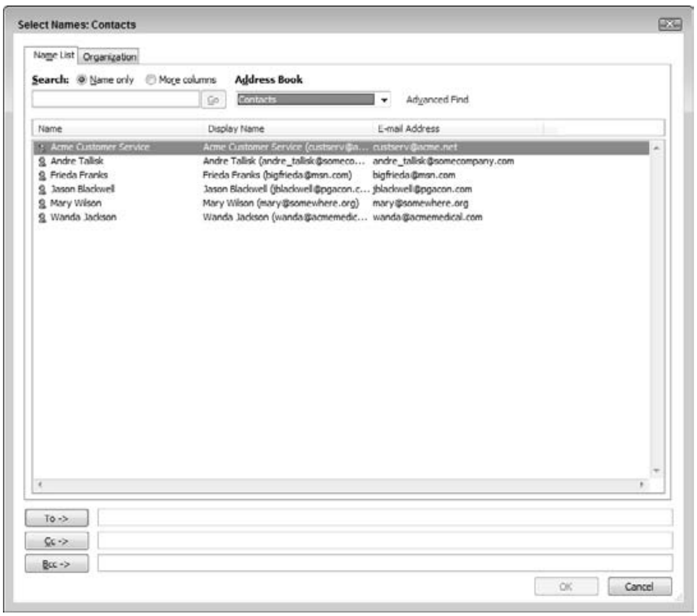
When Outlook is first installed the autocomplete list is empty so it may seem to not be working. As you continue to use Outlook, however, it will become a useful tool. Names that you use less frequently will move to the bottom of the list and eventually disappear.

Entering Recipients from Your Address Book

Any recipients who are listed in your address book can be added to an email message with a few clicks. If you refer back to Figure 4.1 you can see that the email window has To and CC buttons next to the corresponding fields. If the BCC field is visible it will have an adjacent BCC button. Click any of these buttons to open the Select Names dialog box, shown in Figure 4.2.

FIGURE 4.2

Selecting email recipients from your address book.



Deleting Autocomplete Items

If someone changes their email address you may find their old, invalid address still appearing on the autocomplete list. When the list is displayed and you see an address you no longer want, use the down arrow key to highlight it and then press Del.

If you have more than one address book you should select it in the Address Book list. The default address book, which is adequate for many Outlook users, is called Contacts. The entries in the selected address book are displayed in an alphabetized list. Then, add recipients to your message as follows:

- Select a single recipient by clicking it. Select multiple recipients by holding down Ctrl while clicking.
- Add the selected recipient(s) to the To, CC, or BCC field by clicking the corresponding button.
- Add the selected recipients to the active field by pressing Enter. The active field is the one corresponding to the button you clicked — To, CC, or BCC — to display the Select Names dialog box.
- Add a single recipient to the active field by double-clicking the recipient in the list.
- To remove a recipient from the To, CC, or BCC field, click it — the entire name will become highlighted — and press Del.

When you are finished adding recipients, click the OK button to return to the message.

Searching for Recipients

The Select Names dialog box lets you search for recipients by name or other information. Look at the upper-left corner of the Select Names dialog box (refer back to Figure 4.2). If you select the Name option and start typing in the box, Outlook will automatically highlight the first contact in the list that matches what you have typed so far. If there are no matches the highlight moves to the end of the list.

If you select the All Fields option, enter the desired search text in the box and click the Go button. Outlook will display any contacts that have a match in any of their fields, such as Company or Mailing Address. You learn about Outlook contacts and the various kinds of information that can be stored in Chapter 10.

Sending Attachments

An attachment is a file that you send along with an email message. When the recipient receives the message he or she can save the file to disk and open it. Attachments can be a very useful way to pass documents around — whether it's sending photos of the kids to other family members or distributing a Word document to your colleagues for review.

There are several concerns with attachments that you need to be aware of. One has to do with file size. Most email accounts limit the size of attachments that can accompany an email message. The limit varies between different accounts but 10MB is a common figure. Even if your account allows you to send large attachments, the recipient's account may not allow them to receive them.

The other concern I will mention has to do with security. Certain types of files have the potential to harm your computer by introducing a virus or by other means. Outlook and other email client programs block potentially harmful attachments based on the filename extension, which indicates the type of file. For example, executable program files use the .EXE extension and these are blocked by Outlook.

One approach to dealing with both of these concerns is to use a file archiving utility to compress your files into a ZIP or other kind of archive. This not only reduces the file size but also hides the extensions of files that might be blocked on the receiving end.

What kinds of files can you send and receive as attachments? Any image file is okay, including those with the .JPG, .GIF, .PNG, and .TIF extensions. So are text files (.TXT extension), XML files (.XML extension), and most Microsoft Office documents: Word (.DOC and .DOCX extensions), Excel (.XLS and .XLSX extensions), and PowerPoint (.PPT and .PPTX extensions). ZIP archives (.ZIP extension) are okay too.

You may want to review the section on attachment security in Chapter 20 if you will be sending and/or receiving a lot of attachments. The remainder of this section shows you how to add attachments to a message.

When you are composing an email message, you attach a file as follows:

1. If necessary, click the Message tab to display the Message ribbon.
2. Click the Attach File button (with a paper clip icon). Outlook opens the Insert File dialog box as shown in Figure 4.3. The initial display is the files in your My Documents folder.
3. If necessary, use the dialog box to navigate to the folder containing the file.
4. Click the name of the file to attach. To attach multiple files from the same folder, hold down the Ctrl key while clicking.
5. Click the Insert button.

Once you have attached one or more files, the message will display an Attached line in the header, as shown in Figure 4.4. The attached files are listed here along with the file size. If you change your mind and want to remove a file, click its name in the Attached box and press Delete.

FIGURE 4.3

Selecting files to attach to a message.

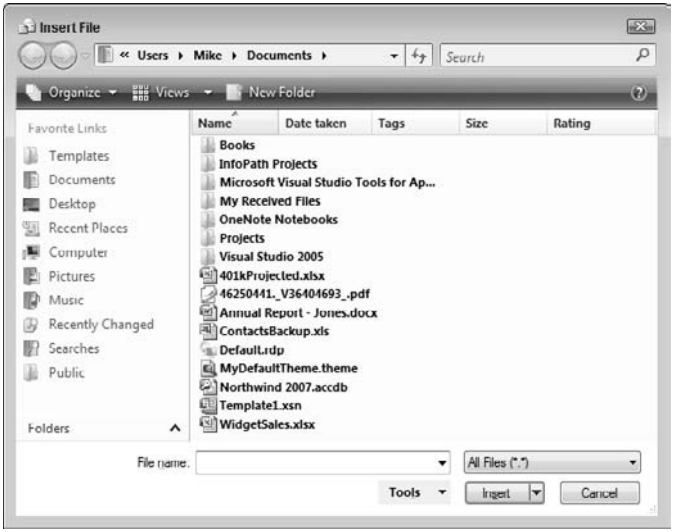
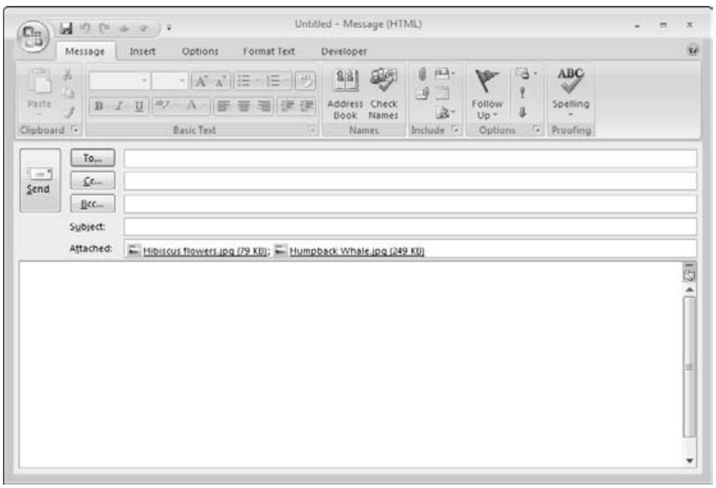


FIGURE 4.4

The names of attached files are displayed in the message header.



Sending and Receiving

Outlook's default is to send and receive messages on all accounts when the program first starts and then every 30 minutes. If you want to send/receive manually, click the Send/Receive button on the toolbar or press F9.

Saving Message Drafts

If you have started to compose a message and decide to complete it later, you can save a copy in the Drafts folder by clicking the Save icon — it looks like a diskette — on the Quick Access toolbar at the top left of the message window. You can also select Save from the menu that is displayed by clicking the Office button (the round icon in the top-left corner of the message window).

When you are ready to continue working on the message, open the Drafts folder by clicking it in the navigation pane, then double-click the message to open it. You can now complete and send the message as usual.

By default, Outlook saves copies of open items, including messages you are composing, every three minutes.

Reading and Replying to Messages

When Outlook receives an email message it is placed in your Inbox folder, as shown in Figure 4.5. By default, messages are sorted by the time and date they were received. You can see that the sender, the subject, the time/date received, and the message size are displayed. Please also note the following:

- A message that you have not yet read is displayed in bold type with a closed envelope icon — for example, the top message in the figure. A message that has been read is displayed in normal type with an open envelope icon — the bottom message in the figure.
- If the message includes one or more attachments, a paper clip icon is displayed.

Reading a Message

To read a message, double-click it in the Inbox. The message will open in its own window, as shown in Figure 4.6.

FIGURE 4.5

Messages that you receive are placed in your Inbox folder.

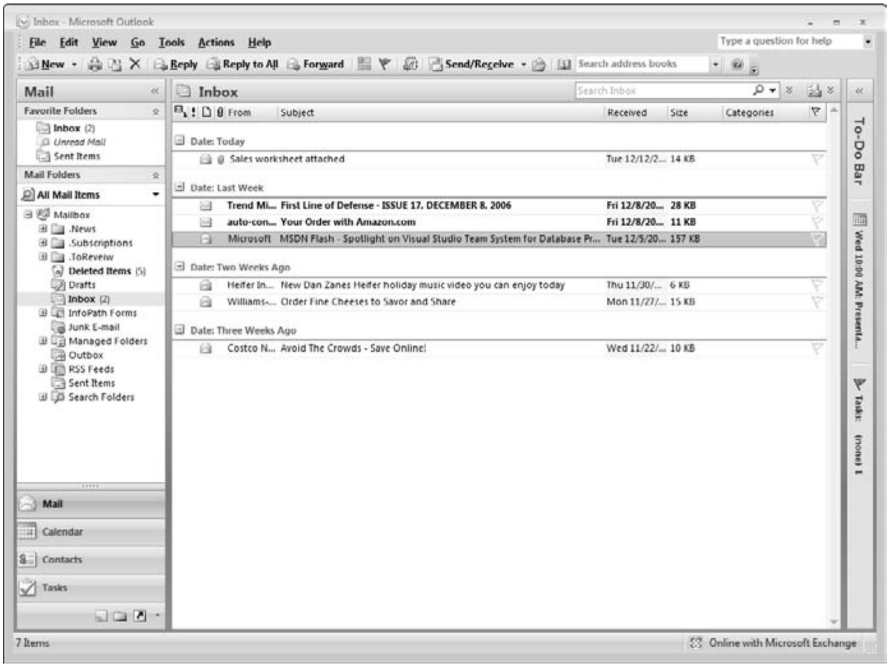


FIGURE 4.6

Reading an email message.

While you have an email message open, you can carry out the following actions:

- Print the message by clicking the Print button on the Quick Access toolbar.
- Close the message and delete it by clicking the Delete button on the ribbon. Outlook moves the message to the Deleted Items folder.
- Close the message without deleting it by clicking the X icon at the right end of the title bar.

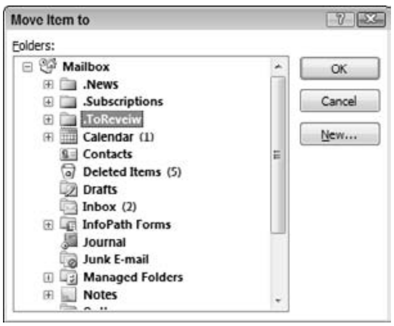
Other actions that you can take with an email message are covered later in this chapter.

You can also move the message from the Inbox to another folder. This is useful when you want to organize received email messages. You learn more about working with Outlook folders in Chapter 18. The basic steps for moving an open message are as follows:

1. Click the Move to Folder button on the message window ribbon.
2. Select Other Folder from the menu. Outlook displays the Move Item To dialog box as shown in Figure 4.7.
3. Click the destination folder. Or, to create a new folder, click the New button. Details on creating a new folder are presented next.
4. Click OK. The message is closed and moved to the specified folder.

FIGURE 4.7

Moving an email message to another folder.



When you are moving an email message to another folder, you are given the opportunity to create a new folder. When you click the New button in the Move Item To dialog box, Outlook opens the Create New Folder dialog box, shown in Figure 4.8. Then:

1. Enter the name for the new folder in the Name box.
2. Make sure that Mail and Post Items is selected in the Folder Contains list.

3. Click the location for the new folder in the list. The new folder will be created as a subfolder to the item you select here.
4. Click OK to close the dialog box and return to the Move Item To dialog box. The new folder will be selected in the list.
5. Click OK to complete moving the mail message.

FIGURE 4.8

Creating a new folder to move an email message to.

Marking Messages as Read or Unread

Messages that have not been read are displayed in bold font and with a closed envelope icon. When you open a message it is marked as read and will be displayed in normal font with an open envelope icon. You can control how a message is flagged. Perhaps you opened a message and then were called away — you might want to mark it as unread so you will be sure to look at it again later.

If the message is open, simply click the Mark as Unread button on the ribbon. If no message is open you can select a message in the Inbox (or whatever mail folder you are in) and then:

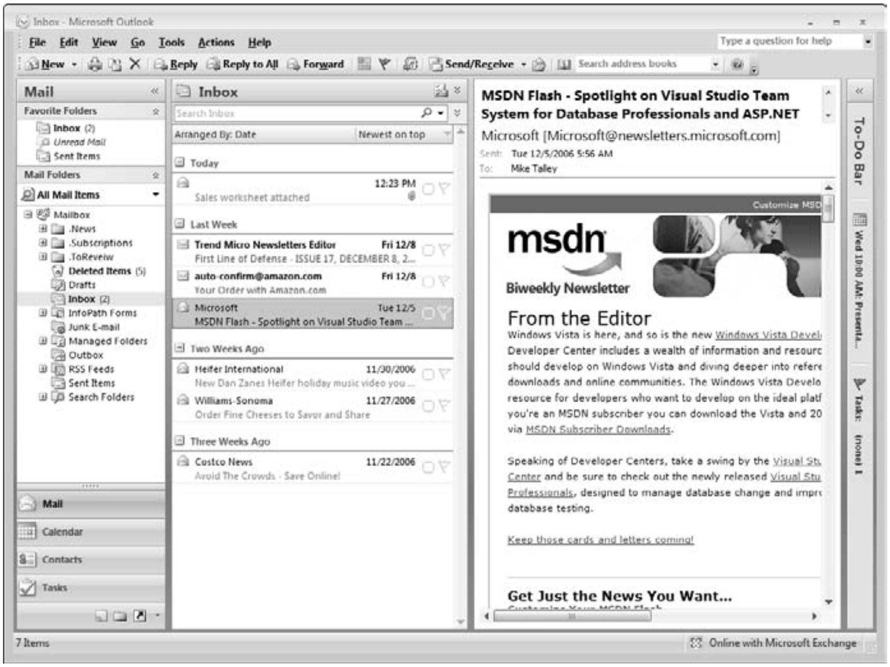
- Select Edit, Mark as Read to mark the message as read.
- Select Edit, Mark as Unread to mark the message as unread.
- Select Edit, Mark All as Read to mark all messages in the folder as read.

Using the Reading Pane

Outlook's reading pane lets you view the contents of a message without opening it. When the reading pane is displayed, it shows the contents of whatever message is selected in the Inbox (or whatever other mail folder you are working in). This is shown in Figure 4.9.

FIGURE 4.9

Using the reading pane to view a message.



The reading pane can be displayed at the bottom of the screen or along the right edge. To control the display of the reading pane, select View, Reading Pane and then select Right, Bottom, or Off.

Normally, viewing a message in the reading pane will not mark it as read — this requires opening the message. However, you can tell Outlook to mark messages as read when they are viewed in the reading pane as follows:

1. Select Options from the Tools menu to open the Options dialog box.
2. Click the Other tab.
3. Click the Reading Pane button to open the Reading Pane dialog box.
4. Put a check in the box next to the Mark Items as Read When Viewed in Reading Pane option.
5. Click OK twice to close all dialog boxes.

Other Actions for Received Messages

When you are viewing a message that you have received, there are several other actions you can take with the message. Each of these actions corresponds to a button on the Message ribbon:

- **Create Rule:** Lets you create a rule for handling similar messages. Rules are covered in Chapter 9.
- **Block Sender:** Adds the message sender to your Blocked Senders list and moves the message to the Junk E-mail folder. You'll find more details on dealing with junk email in Chapter 8.
- **Safe Lists:** Adds the sender or the sender's domain to your safe list. See Chapter 8 for more details.
- **Categorize:** Assign the message to an Outlook category. See Chapter 17 for more information on using categories.
- **Follow Up:** Flag the message for follow-up and/or create a reminder associated with the message.
- **Related:** Find other messages from the same sender or that are related by subject or content.

Replying to and Forwarding Messages

Replying to and forwarding messages are two very useful things you can do with email using Outlook. When a mail message is open you have three buttons in the Respond section of the ribbon:

- **Reply:** Creates a new message addressed to the person who sent you the original message. The new message contains the entire original message, and the subject of the new message is "Re:" followed by the subject of the original message.
- **Reply to All:** Same as Reply except the new message is also addressed to any other people the original message was sent to.
- **Forward:** Creates a new, unaddressed message. The new message quotes the entire original message and the subject is "FW:" followed by the subject of the original message.

At this point the new message is ready for editing. You can add your own text to the body of the message, add or remove recipients (you must add at least one recipient when forwarding), add attachments, and so on. When you're finished, click Send.

Another message forwarding option is to select Forward As Attachment from the Actions menu. A new email message is created with the original message attached as a separate file rather than being inserted into the body of the new message.

What About Attachments?

When you reply (or reply all) to a message, any attachments that came with the original message are not included. When you forward a message, however, attachments are included.

Working with Received Attachments

Outlook lets you save attachments to disk and also lets you view attachments without opening them in their native application. The viewing option is available for many attachment types, including most image files, Word documents, and Excel workbooks.

Saving Attachments

When a received message includes one or more attachments, it will have a small paper clip icon displayed in the Inbox. There are two ways to save attachments. The first method lets you save attachments without opening the message:

1. Select the message in the Inbox (or whatever mail folder you are working in).
2. Select File, Save Attachments from the menu.
3. On the next menu, select the attachment to save. Outlook opens the Save Attachment dialog box.
4. Navigate to the folder where you want the attachment saved.
5. Edit the attachment filename, if desired. Warning: do not change the extension!
6. Click Save.

Repeat these steps, if necessary, for other attachments.

If the message has more than one attachment, the menu that Outlook displays in step 3 also has a Save All Attachments command. Selecting this command opens the Save All Attachments dialog box, as shown in Figure 4.10. Note that all attachments are listed and selected. Then:

1. If you want to save just some of the attachments, select them by clicking and Ctrl+Clicking (to select more than one individual attachment) or Shift+Clicking (to select a group of adjacent attachments).
2. Click OK. Outlook displays the Save All Attachments dialog box.
3. Select the folder to save the attachments in. You cannot edit attachment names — they will be saved under their original names.
4. Click OK.

The other way to save attachments can be used when the message is open or displayed in the reading pane:

1. In the message header, right-click an attachment name.
2. Select Save As from the context menu.
3. In the next dialog box, select a folder for the attachment and the attachment name if desired.
4. Click Save.

FIGURE 4.10

Saving all message attachments at once.

Viewing Attachments

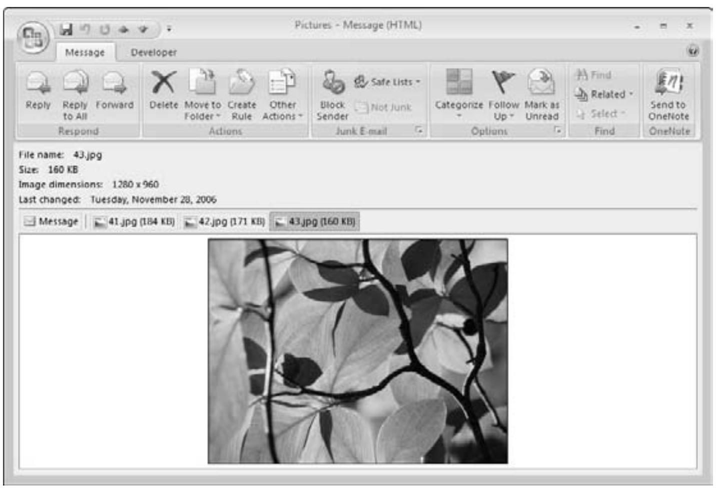
When a message that you receive includes one or more attachments, they will be listed below the message head (both in the reading pane and when the message is open). You'll also see a Message button next to the attachment names.

- Click an attachment name to view the attachment.
- Click the Message button to return to the message.

Figure 4.11 shows these elements along with an attachment that is being viewed.

FIGURE 4.11

Viewing an attachment.



Native Applications

A native, or default, application is an application that is registered on your system for working with a particular kind of file. For some kinds of files there is only one application that can be "native," such as Microsoft Word for Word files and Excel for Excel files. For other kinds of files, such as image files, there are many possibilities and it will depend on what's installed on your system. For example, on my system PhotoShop is registered as the native application for most image files, but on your system it might be Paint Shop Pro or Corel Draw.

Opening Attachments

Opening an attachment in its native application is usually done by saving the attachment to disk, as described earlier, and then starting the application and opening the file as usual. You can, however, open an attachment directly from Outlook by following these steps:

1. Open the message or display it in the reading pane.
2. Right-click the attachment name.
3. Select Open from the context menu.

   Depending on the file type, Outlook may display a warning dialog box asking whether you want to open or save the file. Click Open.
4. The attachment will be opened in its native application.

The reason for the cautionary dialog box in step 3 is security. Some kinds of files, such as Word documents and Excel workbooks, have the potential to contain malicious macro code that could harm your system. This code is harmless unless the file is opened, so you may want to save it to disk first and run a virus scan before opening it.

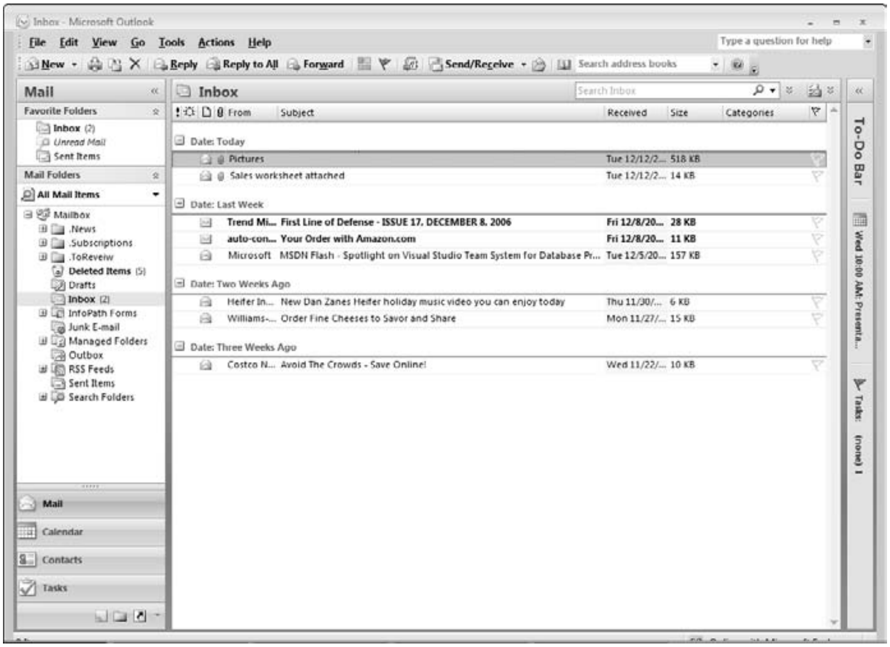
If you do open an attachment this way, you can work with it in the application as you normally would, including saving to disk.

Understanding the Inbox Display

The Inbox, or any other Outlook folder that contains email messages, provides you with a lot of information about the messages it contains. The display is arranged in columns, or fields, with each field identified at the top of the display. You can customize this display by adding, removing, and rearranging columns. That topic is discussed in Chapter 19. For now it's important for you to understand the meaning of the fields in the default Inbox display. They are, from left to right in the default display (see Figure 4.12), as follows:

FIGURE 4.12

The field headings in the default Inbox display.



- **Importance (exclamation point icon):** A red exclamation point is displayed in this field if the sender marked the message as having high importance. Nothing is displayed for normal importance.
- **Reminder (bell icon):** A bell is displayed in this field if the message has been associated with a reminder.
- **Read (page icon):** Displays a closed or open envelope for unread and read messages, respectively. Also displays various icons for special messages such as alerts and meeting requests.
- **Attachment (paper clip icon):** Displays a paper clip icon if the message includes one or more attachments.
- **From:** The name or email address of the message sender.
- **Subject:** The message subject.
- **Received:** The time and date the message was received.
- **Size:** The size of the message and any attachments.

- **Categories:** If the message has been assigned to a category, the category name and icon are displayed here.
- **Follow-up (flag icon):** Displays a flag indicating the follow-up status of the message. A clear flag indicates no follow-up status. Various colored flags indicate other follow-up statuses such as due tomorrow or due next week. A checkmark indicates complete.

You can sort the messages in the Inbox by any of the fields that are displayed. Simply click the field heading to sort by that field in ascending order; click a second time to sort in descending order. If the field heading is wide enough it will display an upward or downward pointing arrow to show you that the messages are sorted by that field in ascending or descending order, respectively. For example, in Figure 4.12 you can see that the messages are sorted by the Received field in descending order.

Summary

This chapter explained the fundamentals of sending and receiving email messages. It also covered sending attachments and dealing with attachments that you receive. Finally, it provided a quick overview of the Inbox display.

There's a lot more to email, more options and flexibility that give you complete control over your messaging. These are covered in Chapter 5.

Chapter 5

Formatting Your Email Messages

IN THIS CHAPTER

An email message does not have to be limited to plain text. Outlook provides you with the ability to create messages with rich formatting, including different fonts, images, charts, and a variety of other elements. No longer is email just for sending simple messages — an email can be, in essence, a small document with all of the impact that is possible with advanced formatting.

Message Format Options

Outlook can create three types of email messages. The type of a message affects the extent to which you can apply formatting to the message. To a lesser extent the type of message also affects who can and cannot read the message. The three types of messages are

- **Plain text:** The most basic type of message, plain text can be read by everyone, no matter how old their email program, but cannot contain any formatting.
- **HTML:** This stands for Hypertext Markup Language, and is the same technique used to format web pages. HTML provides an excellent set of formatting options, and can be read by essentially any modern email client.
- **Rich text:** The rich text format, sometimes referred to as RTF, was developed for word processors. It provides more powerful formatting tools than HTML but can be read by a limited set of email clients, including Outlook and Exchange.

Which format should you use? There's rarely a reason to use plain text unless you believe that your message will be going to people who are using out-of-date software, for example in some third-world countries.

RTF is desirable because of its powerful formatting capabilities. There are just some things you can do in RTF that you cannot do in HTML, although to be honest they are all pretty specialized and the majority of users are unlikely to ever use them.

However, the limitations for reading RTF messages are an important consideration. Unless you know that all recipients will have a compatible email client you should avoid using RTF. If, for example, your company has standardized on Outlook for its email client, it is probably safe to use RTF for your internal company messages.

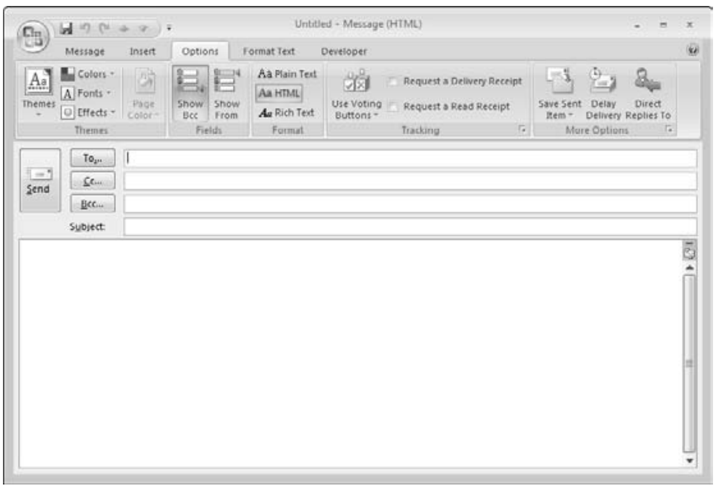
HTML is generally the best choice of message formats for most users. It provides all the formatting capability that most people will ever need, and it can be read by most email clients. For this reason, HTML is Outlook's default message type.

Changing Message

When you are composing a new message, you can change its type by clicking the Plain Text, HTML, or Rich Text button on the Options ribbon (see Figure 5.1). The highlighted button shows the message's current format — which is HTML in the figure.

FIGURE 5.1

Changing the format of an email message.



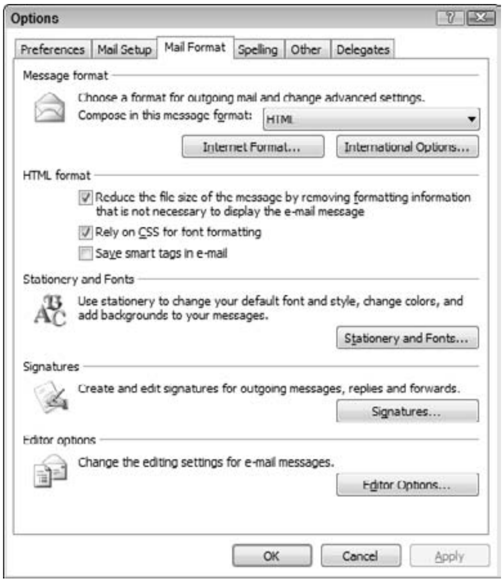
If you change an RTF or HTML message to plain text, any existing formatting will be lost.

As mentioned earlier, Outlook's default is to create messages in HTML format. If you want to change the default format, follow these steps:

1. Select Tools, Options to display the Options dialog box.
2. Click the Mail Format tab (shown in Figure 5.2).
3. In the Message Format section, select the desired default format in the list.
4. Click OK.

FIGURE 5.2

Changing the default message format.



Now, every new email message that you create will have the specified format — although you can always change it for an individual message as described earlier.

Formatting Text

Tools for formatting message text are located on the Format Text ribbon in the email window. Some of the more frequently used text formatting tools are duplicated on the Message ribbon, for ease of access. Text formatting is divided into two categories: font and paragraph.

The Format Painter

The format painter lets you copy font and paragraph formatting from one location in the message and "paint" it onto other text. It works as follows:

1. Click anywhere in text that has the desired formatting.
2. Click the Format Painter button in the Clipboard section of the Message ribbon (it is also present on the Format Text ribbon). The mouse pointer will display a small paintbrush icon.
3. Drag the mouse over the target text.

If you want to paint more than one section of text, double-click the Format Painter button. It will remain active until you click it again.

Font Formatting

Font formatting affects individual characters in a message. It encompasses things such as underlining and italic, and can be applied to anything from a single character to an entire message. Most font formatting can be applied in two ways, either to selected text or to text you are about to type. Some formatting can be applied only to selected text. Selecting text is done as in most other applications:

- With the mouse, drag over the text.
- With the keyboard, hold down Shift and use the cursor movement keys.
- To unselect text, click anywhere outside the selected text or press any arrow key (without Shift).

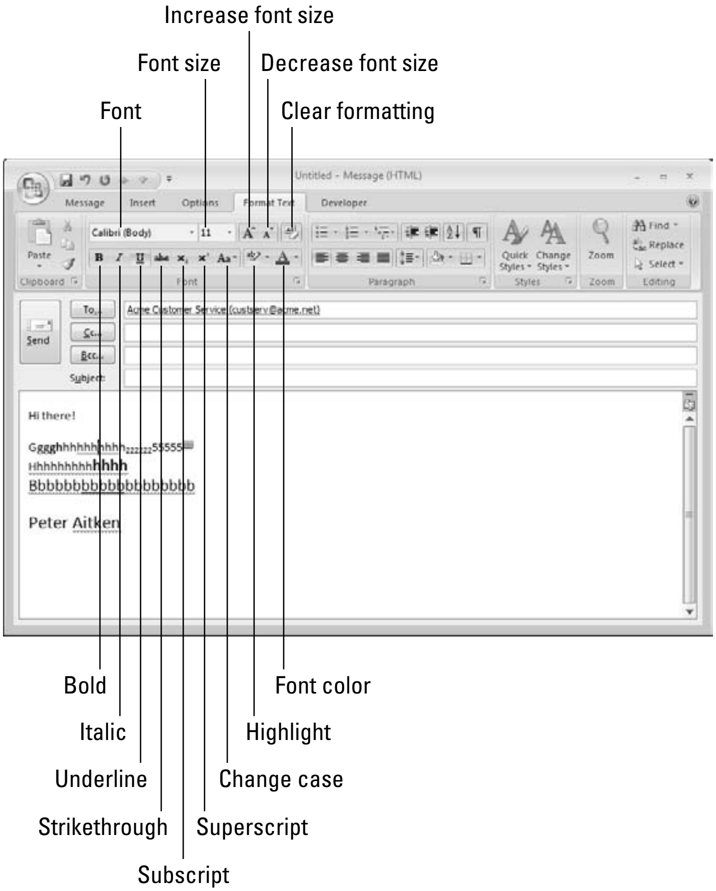
The font formatting tools are located in the Font section of the Format Text ribbon. They are identified in Figure 5.3 and described here.

- **Font:** Select the font, or typeface.
- **Font size:** Select the font size, in points (1 point = 1/72 inch).
- **Increase/decrease font size:** Increases or decreases font size by one step.
- **Clear formatting:** Removes all formatting from text.
- **Bold:** Toggles boldface on and off.
- **Italic:** Toggles italic on and off.
- **Underline:** Click the button to toggle the default single underline. Click the adjacent arrow to select different underline styles and colors.
- **Superscript/subscript:** Click to toggle text between superscript or subscript and normal.

- **Change case:** Click then select from the menu to change the case of selected text.
- **Highlight:** Click the button then drag over text to apply highlighting in the default color (displayed on the button). Click the adjacent arrow to select a highlight color or turn highlighting off.
- **Font color:** Click the button to change font color to the color displayed on the button. Click the adjacent arrow to select a different font color.

FIGURE 5.3

Outlook's font formatting tools.



Paragraph Formatting

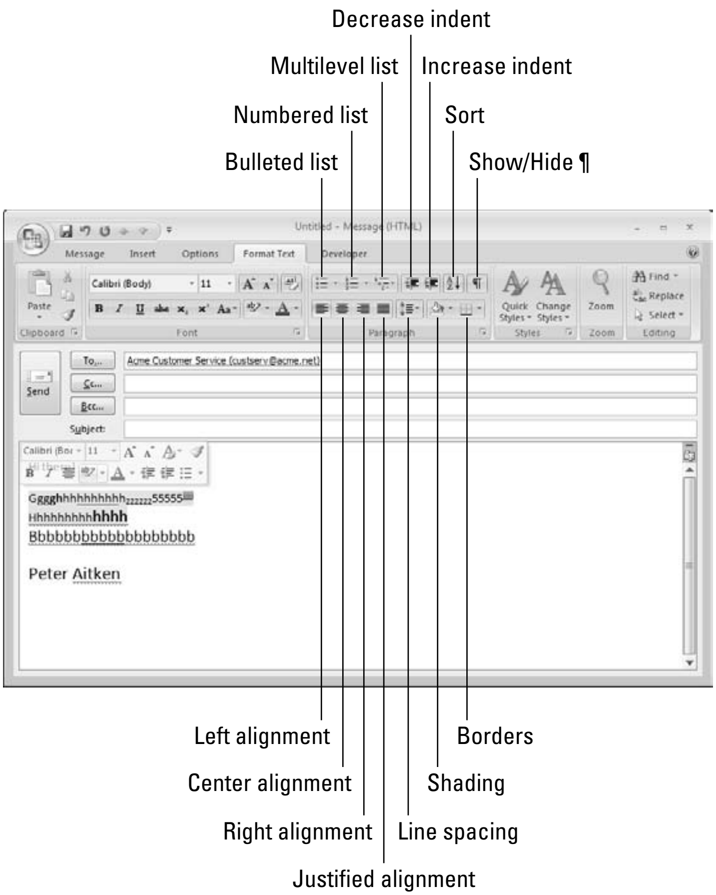
Outlook's paragraph formatting tools are located in the Paragraph section of the Format Text ribbon. These tools, or at least most of them, let you work with formatting that applies to entire paragraphs of text. This includes bulleted and numbered lists, line spacing, and background color. Some tools in this category are not for formatting *per se* but have other functions, which I describe here.

When you select paragraph formatting it will be applied to the paragraph that contains the insertion point (or editing cursor). If you first select text that spans two or more paragraphs, the formatting will be applied to all those paragraphs. A paragraph is created when you press Enter — this marks the end of the paragraph.

The paragraph formatting tools are shown in Figure 5.4 and described here. Additional explanation for some of the items is provided following the list.

FIGURE 5.4

Outlook's paragraph formatting tools.



Soft Returns

Sometimes you may want to start a new line without starting a new paragraph. You do this with a *soft return,* created by pressing Shift+Enter. Text that is separated by a soft return is considered to be part of the same paragraph for formatting purposes.

- **Bullets:** Starts a bulleted list or converts existing paragraphs to a bulleted list. Click the button to apply the default bullet style. Click the adjacent arrow to select a different bullet style.
- **Numbering:** Starts a numbered list or converts existing paragraphs to a numbered list. Click the button to apply the default numbering style. Click the adjacent arrow to select a different numbering style.
- **Multilevel list:** Creates a multilevel list. See the "Multilevel Lists" section of this chapter for a fuller explanation.
- **Decrease/increase indent:** Changes the indent of the left edge of the paragraph.
- **Sort:** Sorts text alphabetically or numerically. See the "Sorting" section of this chapter for a full explanation.
- **Show/Hide ¶:** Shows or hides formatting marks. See the "Show/Hide ¶" section of this chapter for a full explanation.
- **Alignment:** Sets paragraph alignment to left, centered, right, or justified.
- **Line spacing:** Sets the spacing between lines of text. See the "Line Spacing" section of this chapter for a full explanation.
- **Shading:** Sets the shading displayed behind the paragraph. Click the button to apply the default shading displayed on the button. Click the adjacent arrow to select a different shading.
- **Borders:** Displays a border around paragraphs. See the "Borders" section of this chapter for a full explanation.

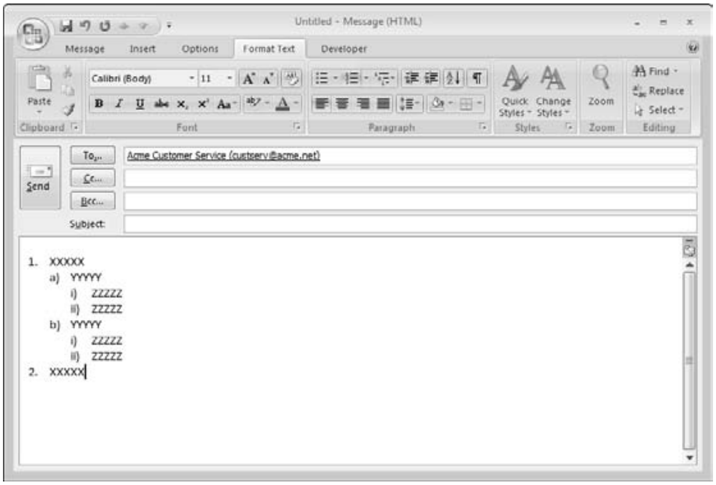
The following sections provide additional explanation for some of the paragraph formatting tools.

Multilevel Lists

A multilevel list contains items (paragraphs) at two or more levels. Each level is marked with a different system of numbering, lettering, or symbols and is usually indented with respect to the previous level. Figure 5.5 shows an example of a three-level multilevel list.

FIGURE 5.5

A multilevel list.

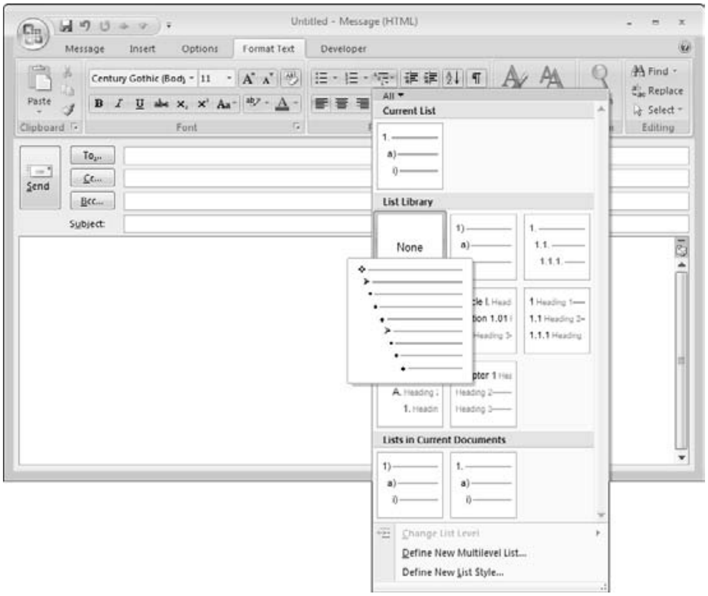


A multilevel list can contain a maximum of nine levels. You can create a multilevel list as you type, as described here:

1. Place the cursor where you want the list to begin.
2. Click the Multilevel List button on the Format Text ribbon to display the Multilevel List menu, shown in Figure 5.6.
3. Click the desired list style.
4. Type in the first list item. This will of course be at the top list level.
5. Press Enter to start the next list item. Press Tab one or more times to move it to a lower list level. Press Shift+Tab to move it to a higher list level.
6. Press Enter to start another list item. Each new list item is created at the same level as the one before it.
7. To change the level of an existing list item, place the editing cursor at the start of the item and press Tab or Shift+Tab.
8. To change the level of two or more list items, select the items and then select Change List Level from the Multilevel List menu.
9. To end the list, press Enter to start a new item, then open the Multilevel List and select None. Subsequent paragraphs will not be part of the list.

FIGURE 5.6

Selecting the multilevel list style.



You can also create a multilevel list from existing text:

1. Select the paragraphs that you want to be in the list.
2. Open the Multilevel List menu and select the desired list style. Outlook will convert the selected paragraphs into a multilevel list.
3. To change the level of individual paragraphs, place the editing cursor at the start of the item and press Tab or Shift+Tab.
4. To change the level of two or more list items, select the items and then select Change List Level from the Multilevel List menu.

To change the style of an existing multilevel list, select the entire list and then select the desired new style from the Multilevel List menu. If you want to change a multilevel list back to normal text, select the entire list and then select None from the Multilevel List menu.

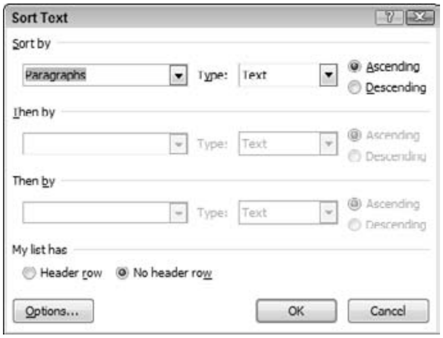
Sorting

The Sort command can be used to arrange paragraphs in alphabetical order, either ascending (A–Z) or descending (Z–A). To perform a sort:

1. Select the paragraphs that you want to sort.
2. Click the Sort button on the Format Text ribbon. Outlook displays the Sort Text dialog box (see Figure 5.7).
3. Select the Ascending or Descending option.
4. Click OK.

FIGURE 5.7

Sorting paragraphs alphabetically.



The additional settings that you see in the Sort Text dialog box are used when you are sorting a table. You learn about tables in Chapter 6.

Line Spacing

By default, lines of text in an Outlook email message are single spaced. You can change this as follows:

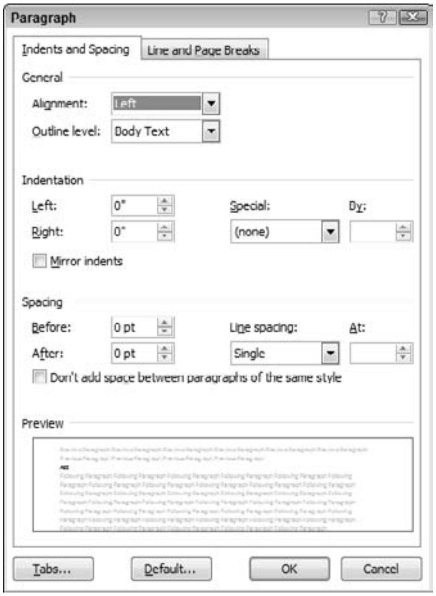
1. To change spacing for a single paragraph, place the cursor anywhere in the paragraph. To change spacing for multiple paragraphs, select them.
2. Click the Line Spacing button on the Format Text ribbon to display the Line Spacing menu.
3. Select the desired spacing: Single, 1.5, or Double.
4. For more control over spacing, select Paragraph from the Line Spacing menu to display the Paragraph dialog box (see Figure 5.8).

Points and Line Spacing

The default unit of measurement for line spacing (and also for font size) is *points*, a printer's measurement equal to 1/72 of an inch. Generally, single spacing is slightly larger than the size of the font in use. For example, line spacing of approximately 13 points would be considered single spacing for an 11 point font. You can enter spacing values in inches if you prefer. Simply enter a number followed by the " (double quote) symbol and Outlook will convert the inch value to points.

FIGURE 5.8

The Paragraph dialog box gives you complete control over line spacing.



In the Paragraph dialog box, it is the Spacing area that is relevant to line spacing. You can precisely control spacing between lines in a paragraph as well as space before and after the paragraph. Your line spacing options, selected from the Line Spacing list, are

1. **Single, 1.5, or Double:** Single, one and a half, or double line spacing.
2. **At Least:** Line separation will be at least the value entered in the At box. It may be increased if needed to accommodate large fonts and so on.

3. **Exactly:** Line separation will be exactly the value entered in the At box and will never be adjusted.
4. **Multiple:** Spacing will be the number of lines entered in the At box.

To control space before and after a paragraph, enter the desired values in the Before and After boxes.

Show/Hide ¶

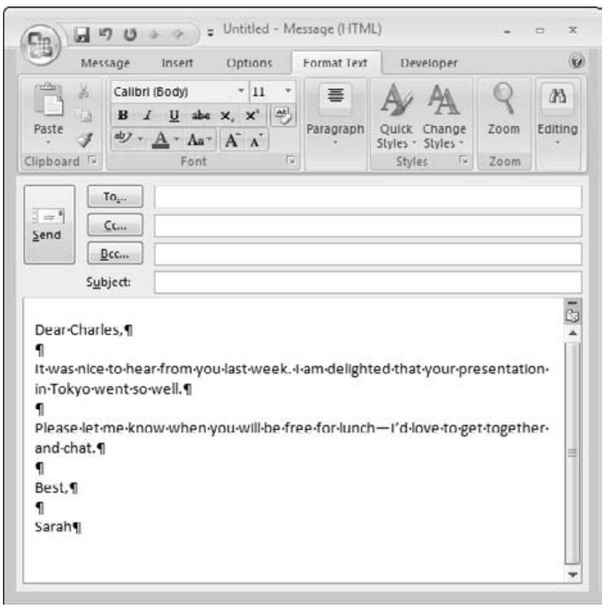
The Show/Hide ¶ button lets you display formatting marks in your text. Formatting marks indicate where normally invisible formatting elements are located. They are

- Paragraph marks (where you pressed Enter) are marked by the ¶ symbol.
- Soft returns (where you pressed Shift+Enter) are marked by the ↵ symbol.
- Tabs are marked with the → symbol.
- Spaces are marked by a dot.

Figure 5.9 shows an email message with formatting marks displayed. If you are having trouble getting the formatting to work just the way you want, displaying formatting marks can often help you locate the source of the problem.

FIGURE 5.9

Displaying formatting marks can help you to solve formatting problems.

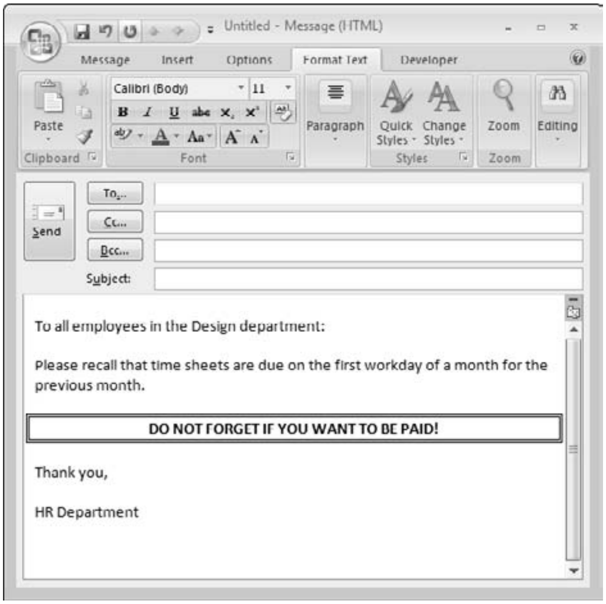


Borders

Outlook's border feature is most frequently used with tables, a topic that is covered in Chapter 6. You can, however, use borders with regular text. For example, Figure 5.10 shows the use of a double border to call attention to a paragraph.

FIGURE 5.10

Using borders with paragraphs.



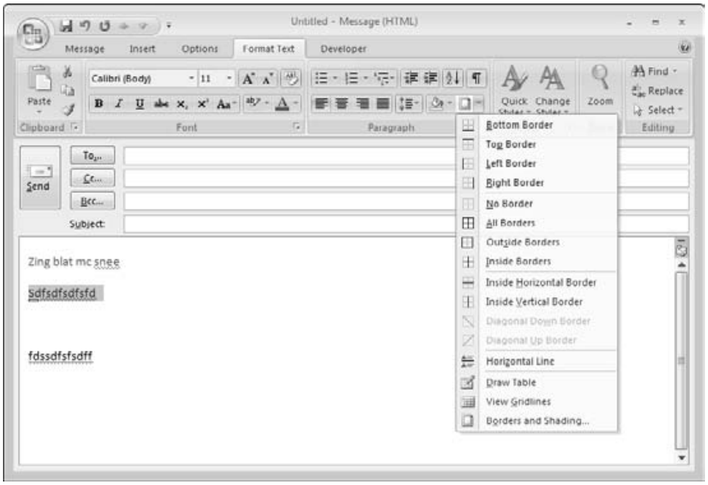
To apply borders:

1. Select the paragraph(s) that you want to apply borders to.
2. Click the arrow adjacent to the Borders button on the Format Text ribbon. Outlook displays the Borders menu (see Figure 5.11).
3. Click the style of border you want, or click No Border to remove existing border.

If you click the Borders button itself, or select Borders and Shading from the Borders menu, Outlook opens the Borders and Shading dialog box. This dialog box gives you more control over borders. It is covered in the section on tables in Chapter 6.

FIGURE 5.11

Selecting paragraph borders with the Borders menu.



Using Quick Styles

Outlook quick styles, or just styles from here on, provide a quick and easy way to apply formatting to text. A style combines various aspects of formatting, such as font name and size, boldface, and text color, so you can apply all the formatting in a single step. You can use Outlook's defined styles and you can also define your own. Styles apply to entire paragraphs — remember, you define paragraphs by pressing Enter to end a paragraph and start another.

Applying a Style

To apply a style, place the cursor in the target paragraph or select multiple paragraphs. Then, click the Quick Styles button on the Format Text ribbon and select the desired style from the Quick Styles menu (shown in Figure 5.12). Note that as you move your mouse over the available styles, your text changes to preview each style. To remove a style, follow these steps but select Clear Formatting from the menu.

NOTE **If you create an email message based on a theme or stationery, as described later in this chapter, you will not be able to use quick styles with the message.**

Defining a Style

If the styles that are already defined in Outlook do not suit your needs, you can create your own. Here are the steps to follow:

1. Format a paragraph in the message with the formatting that you want to be part of the new style (although you can make changes later in this process). Make sure the insertion point remains in that paragraph.

2. Click the Quick Styles button on the Format Text ribbon.
3. Select Save Selection as a New Quick Style from the menu. Outlook displays the Create New Style from Formatting dialog box, shown in Figure 5.13.
4. Enter a name for the new style in the Name box. You cannot use a name that is already assigned to a style.
5. Click OK.

If you want to make further changes to the style, click the Modify button in step 4. The dialog box will expand to allow you to change various aspects of the formatting.

FIGURE 5.12

Applying Quick Styles to message text.

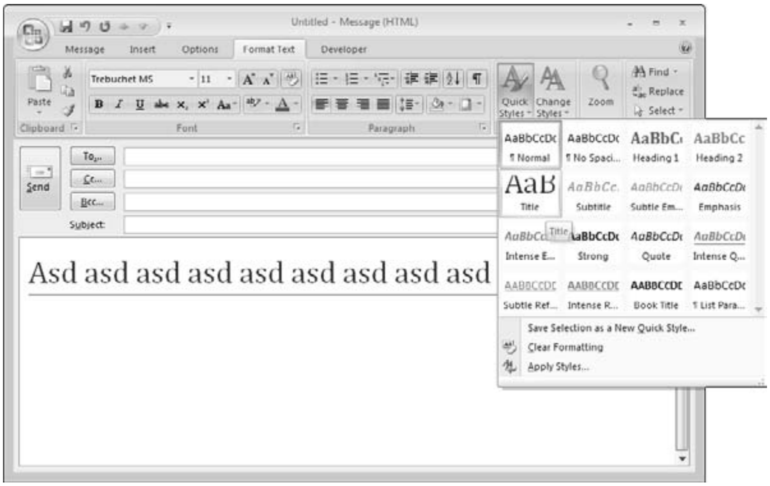
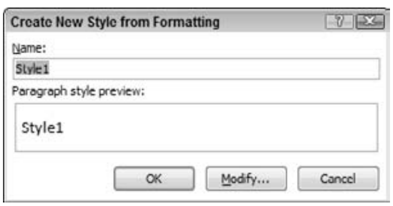


FIGURE 5.13

Creating a new style based on existing formatting.



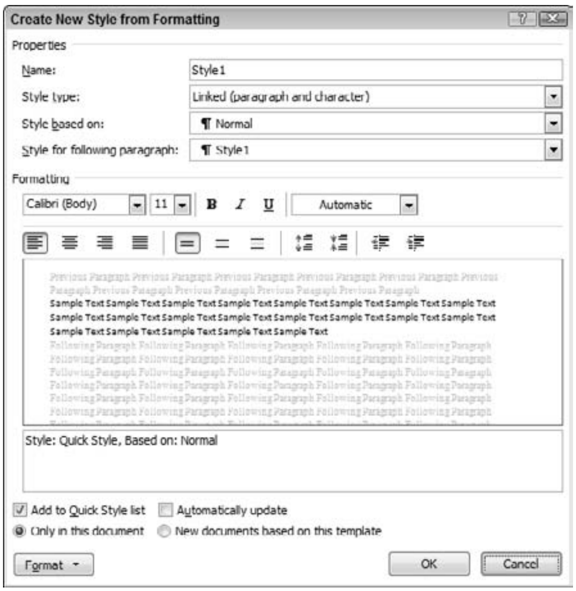
Modifying, Renaming, and Deleting a Style

To modify an existing style, follow these steps:

1. Click the Quick Styles button on the Format Text ribbon.
2. Right-click the style you want to modify.
3. Select the command from the popup menu as follows:
   - **Update XXXX to Match Selection:** Changes the style to match the formatting of the currently selected text.
   - **Modify:** Opens the dialog box shown in Figure 5.14 where you can make changes to the style's formatting.
   - **Rename:** Assigns a new name to the style.
   - **Remove from Quick Style Gallery:** Removes the style from the Quick Styles menu (although the style remains available).

FIGURE 5.14

Modifying an existing style.



HTML Only for Themes

Themes and stationery are applicable only to HTML format messages.

Using Themes and Stationery

Themes and stationery are two related tools that let you provide a global design to an email message. Stationery includes a background color and/or pattern, and themes include backgrounds and other elements such as fonts, list styles, and effects. Using a theme or stationery does not mean the message formatting is fixed — you can use the theme formatting as it is defined or change it as desired.

Where do you get themes? There are several sources:

- Defined themes that are built into Outlook.
- Microsoft Word themes that are installed with Outlook.
- Themes you download from Office Online.
- Themes that you customize yourself.

The primary difference between Outlook themes and Word themes is that you can customize a Word theme but Outlook themes cannot be modified. There is also a difference in the way you apply them, as explained next.

Applying an Outlook Theme to All New Messages

You can select a default theme that will automatically be used for all new HTML email messages:

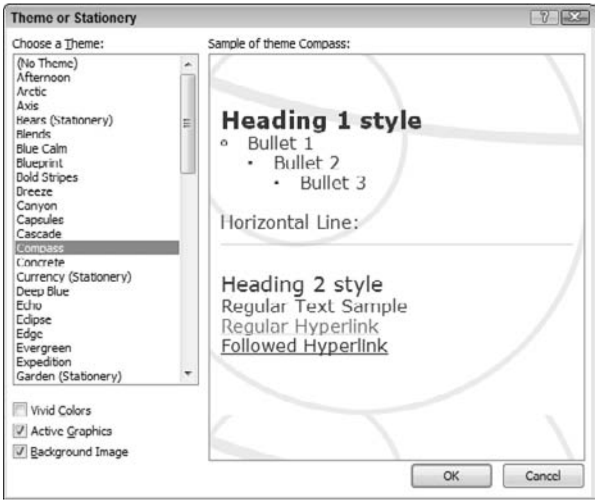
1. Select Tools, Options from the main Outlook menu to display the Options dialog box.
2. If necessary, click the Mail Format tab.
3. Click the Stationery and Fonts button to display the Signatures and Stationery dialog box.
4. Click the Theme button to display the Theme or Stationery dialog box (see Figure 5.15).
5. Click a theme or stationery name to see it previewed in the Sample area.
6. Depending on the theme selected, one or more of the following options may be available in the lower-left corner of the dialog box:
   - **Vivid Colors:** Use a brighter color scheme.
   - **Active Graphics:** Determines whether any active graphics that the theme contains are used.
   - **Background Image:** Turn this option off to use the theme without its background image.

   Click OK three times to exit all dialog boxes.

To remove the default theme so that new messages are created without a theme, follow the preceding steps and select No Theme in step 5.

FIGURE 5.15

Selecting a theme or stationery.



Applying an Outlook Theme to a Single New Message

You can also apply a theme or stationery to a single new message, overriding the default theme (if one is defined):

1. Select Actions, New Mail Message Using from Outlook's main menu.
2. Select More Stationery from the next menu. Outlook displays the Theme or Stationery dialog box as shown previously in Figure 5.15.
3. Select the desired theme.
4. Click OK.

Removing All Formatting

The quickest way to remove all formatting from an HTML or RTF format message is to convert it to a plain text message. You do this by clicking the Plain Text button in the Format section of the Options ribbon. Outlook will warn you that all formatting will be lost — click Continue to complete the process. Then you can change the message back to HTML or RTF format if desired. This technique works for removing a theme or stationery from a message as well.

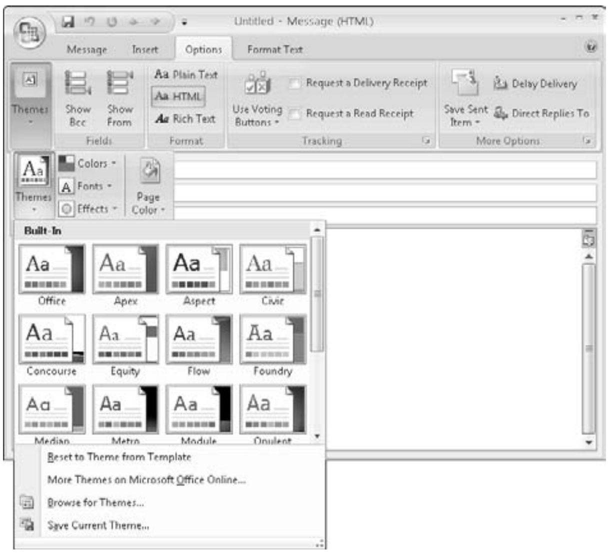
Applying a Word Theme to a Message

To apply a Word theme to an email message, first create a new HTML format message. Then:

1. Click in the body of the message.
2. Click the Themes button on the Options ribbon and click Themes again on the menu. Outlook displays the Themes menu as shown in Figure 5.16. Built-in themes are listed in the Built-In section of the menu. If you have defined any custom themes they will be listed in the Custom section of the menu.
3. Click the desired theme.

FIGURE 5.16

Applying a Word theme to a message.



You'll note that there are several commands at the bottom of the Themes menu. Their functions are

- **Reset to Theme from Template:** If the selected theme has been customized, resets it to the original settings.
- **More Themes on Microsoft Office Online:** Look for additional themes on Office Online.
- **Browse for Themes:** Look for additional themes on your local computer or network.
- **Save Current Theme:** If you have customized the selected theme (covered in the next section), saves it to disk.

Customizing a Theme

Once you have applied a theme to a message, you can customize the theme by changing its fonts, its colors, and its effects. You can apply the changes to the current message only or save them for future use. There are three elements of a theme:

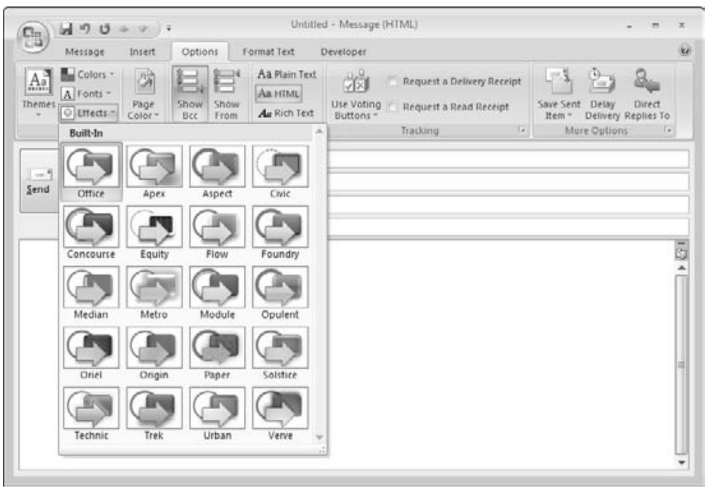
- **Fonts:** A theme's fonts consist of a heading font and a body font. A theme may use the same font in different sizes for both or it can use two distinct fonts.
- **Colors:** A theme's colors consist of a set of defined colors for various message elements.
- **Effects:** A theme's effects determine how various graphical elements of a message are drawn.

Each theme has assigned fonts, colors, and effects. Customizing a theme means to change the fonts, colors, and/or effects associated with the theme. To customize a theme:

1. Apply a theme to the message as described in the previous section.
2. Click one of the buttons next to the Themes button on the Options ribbon. There are three: Colors, Fonts, and Effects. Outlook displays the corresponding menu — Figure 5.17 shows the Effects menu.
3. Click the color, font, or effect that you want to apply to the theme.
4. Repeat steps 2 and 3 as needed for other theme elements.

FIGURE 5.17

Using the Effects menu to customize a Word theme.



Creating Custom Font and Color Sets

Outlook provides a selection of defined font and color sets that you can use with Word themes. These sets are the selections you see on the Theme Colors and Theme Fonts menus when you customize a theme as described in the previous section. You can create custom color and font sets as well and have these available for use in Word themes. You cannot, however, create custom theme effects — you are limited to the effects that are supplied with Outlook. Any custom color or font sets that you create will be available in the Custom section of the Theme Colors or Theme Fonts menu.

To create a custom color set:

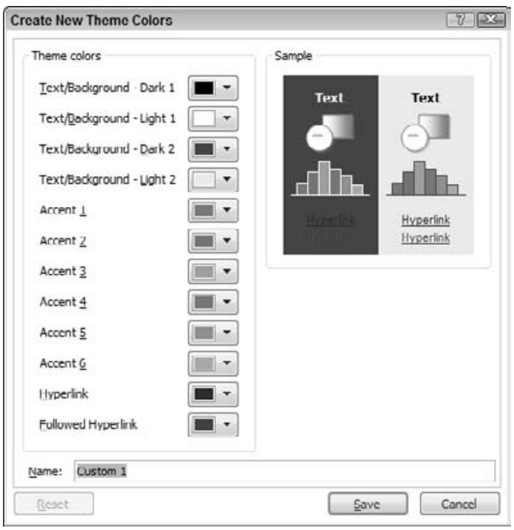
1. Click the Colors button in the Themes section of the Options ribbon.
2. Select Create New Theme Colors from the menu. Outlook displays the Create New Theme Colors dialog box as shown in Figure 5.18. The buttons on the left represent the colors that make up a color set.
3. Click the button for the color you want to change and select the new color from the palette that is displayed. The selected colors are previewed in the Sample section of the dialog box.

   Repeat step 3 for additional colors as desired.

   If you want to start over, click Reset to return all colors to their original values.
4. Assign a name for this color set in the Name box.
5. Click the Save button.

FIGURE 5.18

Creating a custom set of theme colors.

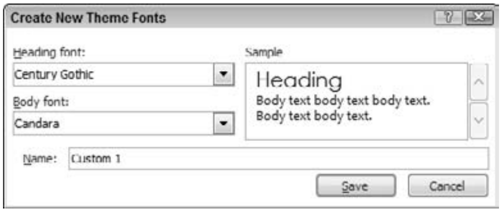


To create a custom font set:

1. Click the Fonts button in the Themes section of the Options ribbon.
2. Select Create New Theme Fonts from the menu. Outlook displays the Create New Theme Fonts dialog box as shown in Figure 5.19.
3. Select a new heading font and/or body font from the lists provided.
4. Enter a name for the font set in the Name box.
5. Click Save.

FIGURE 5.19

Creating a custom set of theme fonts.



Changing the Page Background

Sometimes you may not want to apply a theme or stationery to a message but only to change the message background. Outlook provides the ability to use a color, gradient, texture, pattern, or picture as the message background. You can also change the background that has been assigned to a message as part of a stationery or theme. To change the page background, click the Page Color button in the Themes section of the Options ribbon. Outlook displays the Theme Colors menu as shown in Figure 5.20. Then do one of the following:

- Click the desired color on the displayed palette.
- Click No Color to remove an existing background from the message.
- Click More Colors to select from a wider palette of colors.
- Click Fill Effects to use a gradient, texture, pattern, or image as the background.

If you select Fill Effects from the Theme Colors menu, Outlook displays the dialog box that is shown in Figure 5.21. You can see that this dialog has tabs for gradients, textures, patterns, and pictures. Select the appropriate tab and then make entries as needed to get the background you want.

FIGURE 5.20

Changing the message background.

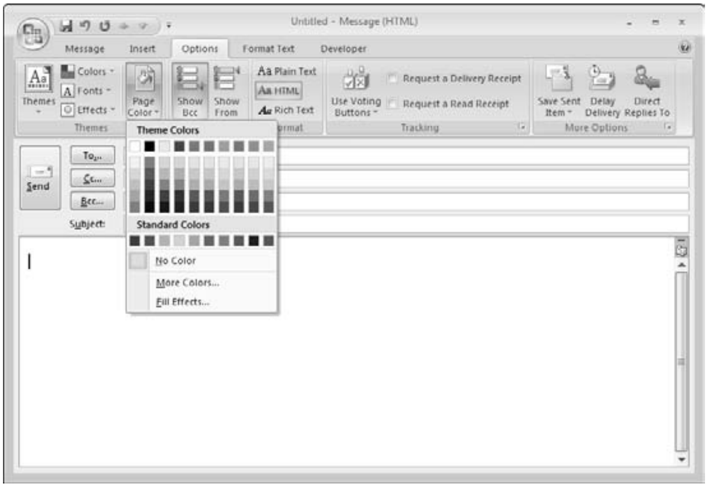
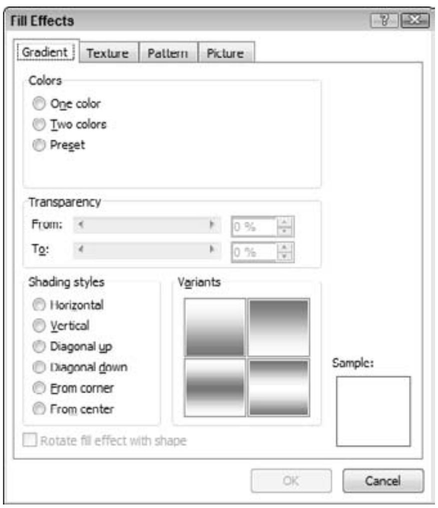


FIGURE 5.21

Applying fill effects to the message background.



Creating and Using Signatures

A *signature* is a section of text that is added automatically to the end of email messages that you create. It can include your name, title, company name, and other information that you want to include with all messages. Note that this is distinct from a *digital signature*, a security device that is covered in Chapter 20.

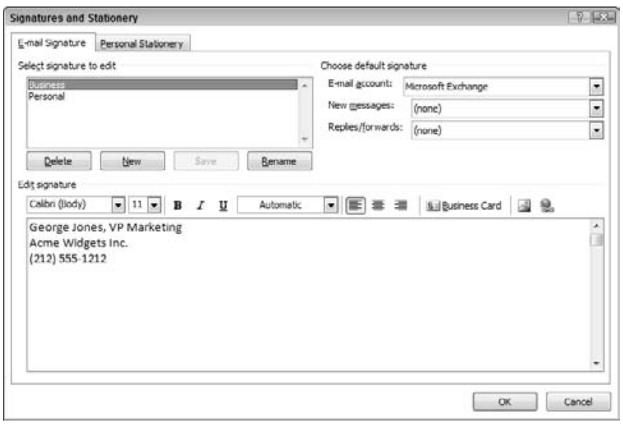
Creating and Editing Signatures

You can define as many different email signatures as you need. To define a signature:

1. Select Options from the Tools menu to open the Options dialog box.
2. Click the Mail Format tab.
3. Click the Signatures button to open the Signatures and Stationery dialog box.
4. If necessary, click the E-mail Signature tab (shown in Figure 5.22).
5. Click the New button to open the New Signature dialog box.
6. Enter a name for the signature and click OK to return to the E-mail Signature tab.
7. Enter the desired text in the Edit Signature field, using the formatting tools that are provided to change font, alignment, and other aspects of formatting. You can also copy text from Word or another program and paste it here.
8. Click the Save button to save the signature.

FIGURE 5.22

Working with email signatures.



You also use this tab to edit an existing signature. Simply select the signature in the Select Signature to Edit list, edit it as desired, and click Save.

You can apply a signature manually to individual email messages. If you want a signature added automatically, use the Choose Default Signature options in the top-right corner of the dialog box:

- In the E-mail Account list, select the email account for which you want a signature used (this is relevant only if you have two or more email accounts).
- From the New Messages list, select the signature to use for new messages.
- From the Replies/Forwards list, select the signature to use when you reply to or forward a message.

Adding a Signature to a Message

If you want to add a signature to a message manually, click the Signature button on the Insert ribbon, then select the desired signature from the menu. The selected signature will be added to the end of the message.

Summary

Outlook provides you with a powerful set of formatting tools. No longer are you limited to sending boring, plain text messages. As long as your recipients can read HTML messages — and that's almost everyone these days — you can use fonts, borders, backgrounds, themes, and other elements to create visually appealing messages.

Chapter 6

Working with Advanced Email Message Components and Editing Tools

An Outlook email message is not limited to the formatting options covered in Chapter 5. Many of the most powerful things you can do with a message you are creating is to insert *objects*. This is a general term for all the various elements that Outlook lets you insert in a message — tables, pictures, clip art, and animations, just to name a few. This chapter also covers some of the advanced editing and proofing tools that Outlook provides.

If you have any experience using Word 2007, you will notice a lot of similarity between it and the Outlook editor. That's because the two programs share the same editing engine, so most of the editing capabilities you have in Word are also available in Outlook.

IN THIS CHAPTER

- **Inserting pictures and other objects in a message**
- **Using hyperlinks and bookmarks**
- **Working with tables**
- **Using proofing and editing tools**

Adding Objects to Messages

Email messages that you create with Outlook can be very sophisticated. They can include a variety of *objects* — a generic term for elements such as images and clip art. This section provides an overview of inserting these objects into your messages. It starts with an overview of what kinds of objects are available. Tables, which are a special kind of object, get their own section later in the chapter. You cannot add objects to plain text format messages.

Adding an object is not the same as attaching something to a message. When you add an object to a message, for example an image, it is displayed as part of the message. In contrast, an attachment does not display in the message.

Kinds of Email Message Objects

The following sections provide details on the variety of objects that you can use in your email messages. What objects are available? Here are brief descriptions:

- **Picture:** Any image, such as a digital photograph.
- **Clip Art:** Also images but tend to be small drawings.
- **Smart Art:** Flow charts, organizational charts, processes, and other types of diagrams.
- **Chart:** Bar, line, and other chart types to illustrate numerical data.
- **Shapes:** Various shapes such as rectangles, arrows, and triangles.
- **Hyperlink:** A link that the message recipient can click to navigate to another location.
- **Bookmark:** Identifies a location in a message that can be the target of a hyperlink.
- **Text Box:** A rectangular box for entering text.
- **Quick Part:** A selection of text and/or other message elements that you have saved for reuse.
- **WordArt:** Text with applied artistic effects.
- **Equation:** A mathematical equation.
- **Horizontal Line:** Just what it sounds like.

All objects have some things in common. After you insert it in the message the object will be *selected* as indicated by a border and handles, small circular or rectangular buttons on the border. You can see an example in Figure 6.1, which shows a selected clip art object.

FIGURE 6.1

A selected object displays a border and handles.

When an object is selected you can work with it as I soon describe. To work on other parts of the message, click away from the object. To select the object again, click it. When an object is selected here are some of the actions you can take (some actions may not be applicable to all types of objects):

- To delete the object, press Del.
- To move the object, point at it — the mouse pointer will change to a four-headed arrow. Then drag to the desired position.
- To change the object size, point at one of the handles at a corner or along an edge — the mouse pointer will change to a two-headed arrow. Then drag to the desired size.
- To rotate the object, point at the extra handle extending from the top of the object — the mouse pointer will change to a curved arrow. Then drag to the desired orientation.

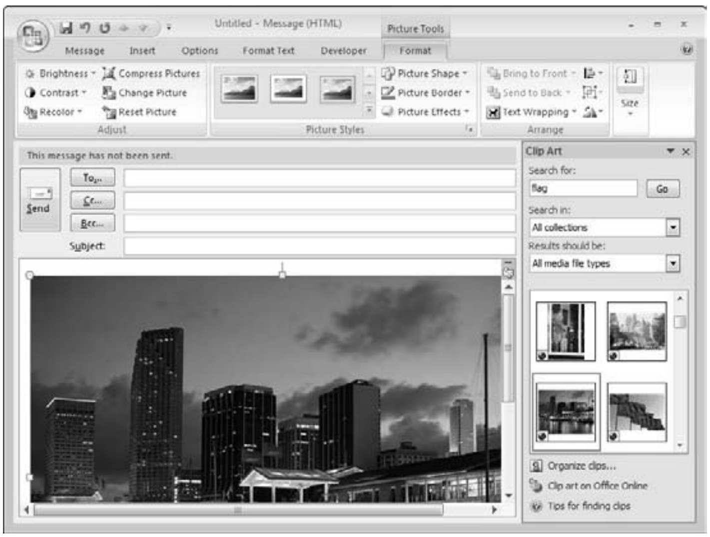
When a message object is selected, Outlook displays a Format ribbon at the top of the message window. The content of this ribbon depends on the type of object selected, and includes tools and commands for working with that type of object. For example, Figure 6.2 shows the ribbon displayed when a picture object is inserted. Some of the tools offered help you with changing picture borders, modifying brightness and contrast, changing text wrapping (how text flows around the picture), and special effects.

Some objects, such as Smart Shapes, also display a Design ribbon when selected. This ribbon provides access to additional commands for working with the selected object.

The remainder of this section shows you how to insert the various kinds of objects that Outlook messages support. First you learn about graphical objects, then text objects.

FIGURE 6.2

When an object is selected, Outlook displays a ribbon for working with that type of object.



Don't Forget Undo

When you are working with objects in a message — or on most other aspects of a message for that matter — you can always press Ctrl+Z to undo your most recent action.

Graphical Elements

Some objects you can insert into an Outlook email message are graphical — that is, they are primarily visual in emphasis.

Images

You can insert essentially any kind of image in an email message, including digital photographs, scans, and drawings. To insert an image in your email message:

1. Click the Picture button on the Insert ribbon. Outlook displays the Insert Picture dialog box (see Figure 6.3).
2. Navigate to the folder where the desired image is located.
3. If you want to view thumbnails of the images, click the Views button at the top right of the dialog box and select Thumbnails from the menu displayed.
4. Click the desired image.
5. Click the Insert button.

FIGURE 6.3

Inserting a picture in an email message.

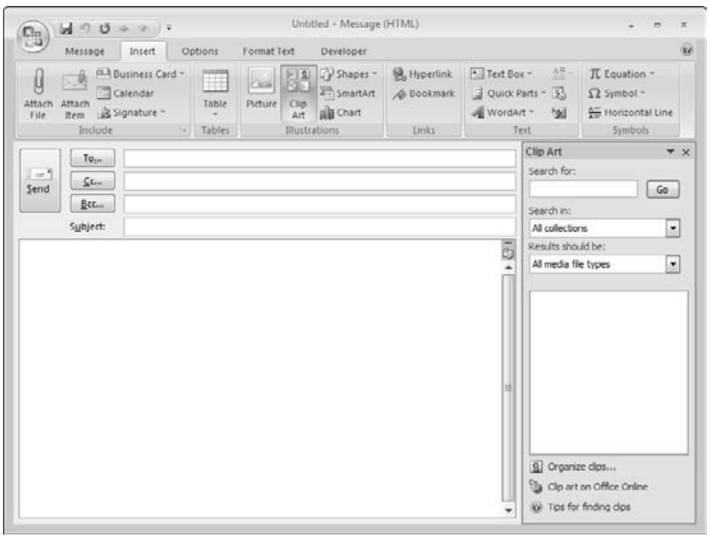
Clip Art

When most people hear "clip art" they think of small drawings used to illustrate or provide emphasis — for example, a flag, a dollar sign, a car, or a palm tree. This is indeed clip art, but the term has expanded to include photographs, sounds, and animations. Outlook lets you search for the clip art you want and then insert it in a message. To find and insert clip art:

1. Click the Clip Art button in the Illustrations section of the Insert ribbon. Outlook displays the Clip Art panel as shown in Figure 6.4.
2. In the Search For box, enter a term that describes what you are looking for.
3. Open the Search In list to select the clip art collections to be searched.
4. Open the Results Should Be list to select the types of clip art to be found.
5. Click the Go button. Outlook searches according to the parameters you entered and displays the results in the bottom part of the Clip Art panel.
6. Browse the results and double-click to insert a clip art item.
7. Click the X in the Clip Art panel title bar to close it.

FIGURE 6.4

Finding clip art to insert in an email message.



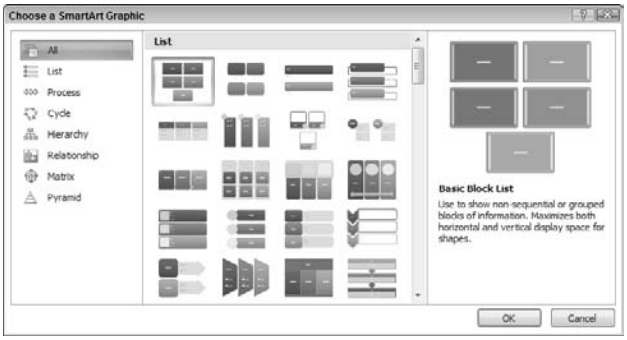
Smart Art

Outlook's Smart Art elements let you add a wide variety of diagrams to an email message. These diagrams are designed to illustrate processes, cycles, relationships, hierarchies, and so on. To add a Smart Art object:

1. Click the Smart Art button on the Insert toolbar. Outlook displays the Choose a SmartArt Graphic dialog box as shown in Figure 6.5.
2. On the left side of the dialog box, select the category of graphic you are interested in.
3. In the center of the dialog box, click the specific diagram you want. It will be previewed on the right.
4. Click OK.

FIGURE 6.5

Selecting a Smart Art diagram to insert in an email message.



Once the Smart Art diagram has been inserted into the message, you edit it using the tools provided by Outlook. For example, Figure 6.6 shows a Bending List, one type of Smart Art diagram, selected for editing. Outlook provides a place for you to type in text as well as Design and Format ribbons for you to select commands related to the object.

Charts

Inserting a chart into a message requires that you have Microsoft Excel installed. To insert a chart into a message, click the Chart button on the Insert ribbon. Outlook displays the Insert Chart dialog box as shown in Figure 6.7. You use this dialog box to select the type of chart that you want by clicking the sample from the gallery on the right. Then, click the OK button.

FIGURE 6.6

Editing a Smart Art diagram.

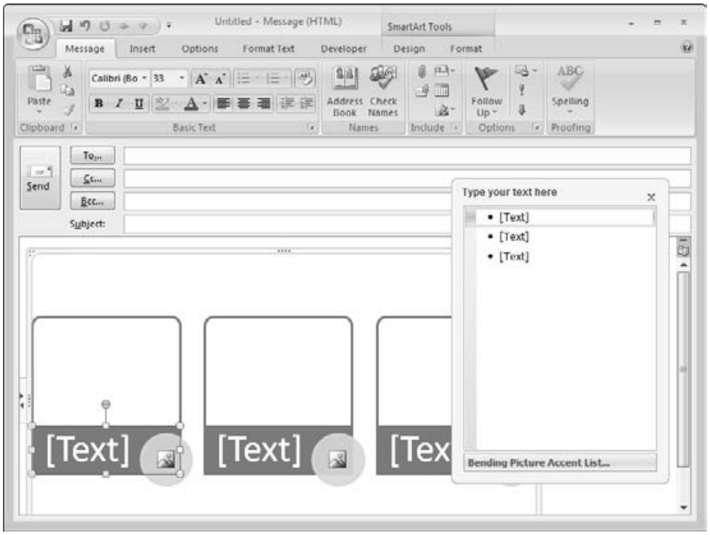
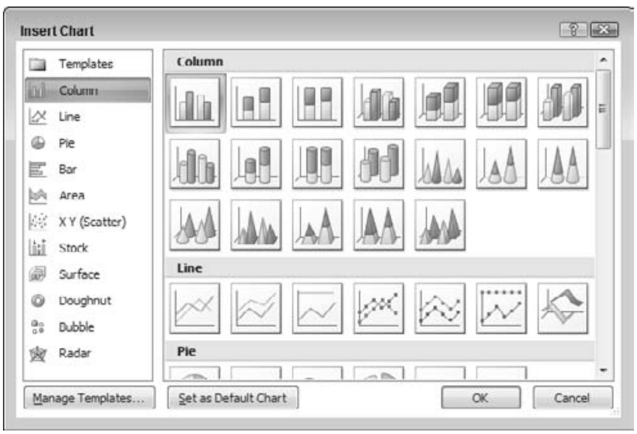


FIGURE 6.7

Choosing the type of chart to insert.



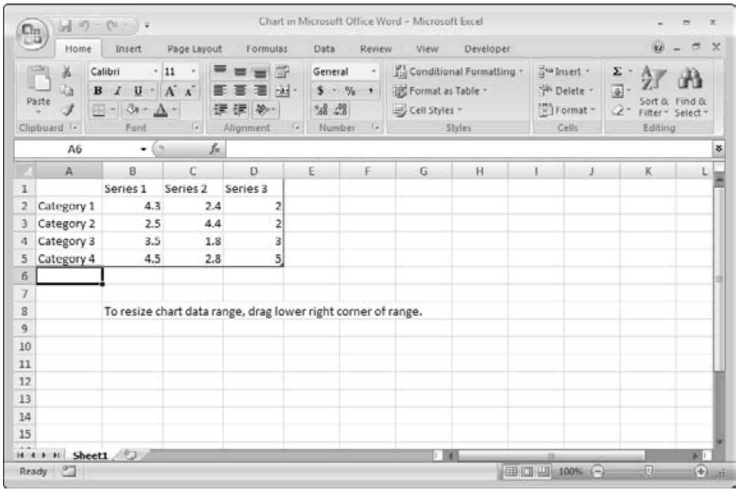
Next, Outlook inserts a chart in the message and opens, in Excel, a worksheet with some dummy data in it, as shown in Figure 6.8. At this point you can do one or more of the following:

- Delete the dummy data and type in your own data.
- Copy data from another workbook and paste it in.
- Expand or contract the data range by dragging the lower-right corner of the blue outline (only the data in the outlined range will be included in the chart).

As you work, the chart in the message will be updated to reflect your changes.

FIGURE 6.8

Editing the data for the chart.



When have finished editing/entering your data, you can close Excel (with or without saving the data as your needs dictate). The chart will be in your message as shown in Figure 6.9. You can complete the message and send it, or you can make changes to the chart format and layout by right-clicking the chart and selecting commands from the popup menu (a topic beyond the scope of this book).

Shapes

Outlook's Shape feature lets you insert a wide variety of shapes into an email message. Each shape is inserted as an image, and that's how it will appear to the message recipient. Figure 6.10 shows an email message with a couple of shapes in it.

FIGURE 6.9

The chart is inserted into your email message and is ready to send.

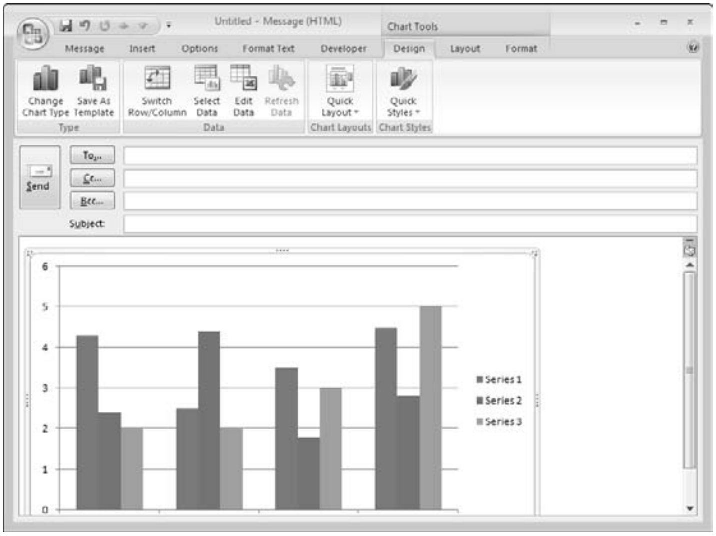
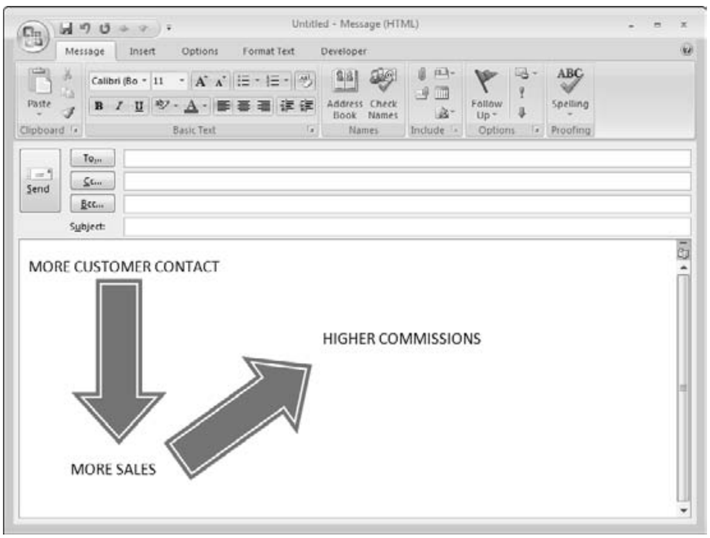


FIGURE 6.10

An email message containing two shapes.

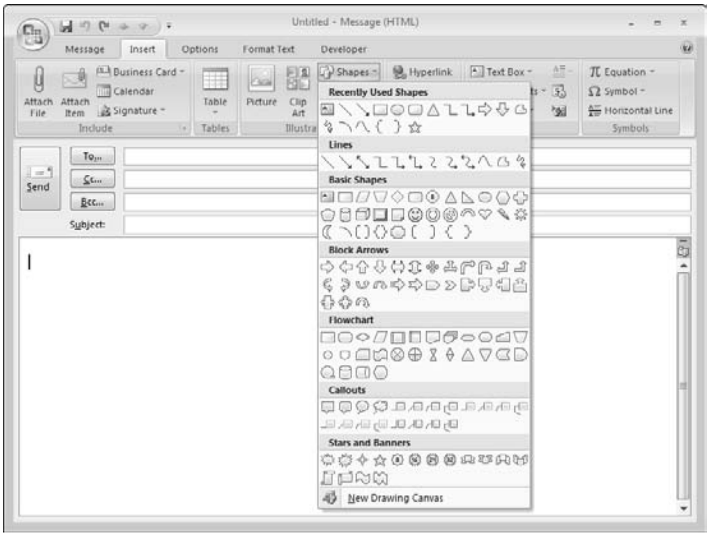


To insert a shape:

1. Click the Shapes button on the Insert ribbon. Outlook displays the Shapes menu as shown in Figure 6.11.
2. Click the shape you want to insert.
3. Drag in the message body to place the shape.

FIGURE 6.11

Selecting a shape to insert into an email message.



WordArt

WordArt is a tool for creating attractive banners and headings. It is called WordArt because it originated as part of the word processing program Microsoft Word. Figure 6.12 shows an example of a message heading created using WordArt.

To add WordArt to a message:

1. Click the WordArt button on the Insert ribbon. Outlook displays the WordArt menu as shown in Figure 6.13.
2. Click the desired style. Outlook displays the Edit WordArt Text dialog box as shown in Figure 6.14.
3. At the top of the dialog box, select the font and size for the WordArt.
4. In the box, type the text for the WordArt. Use the Bold and Italic buttons as desired to make some of the text boldface or italicized.
5. Click OK.

FIGURE 6.12

An example of WordArt in an email message.

FIGURE 6.13

Selecting the style of WordArt to insert in an email message.

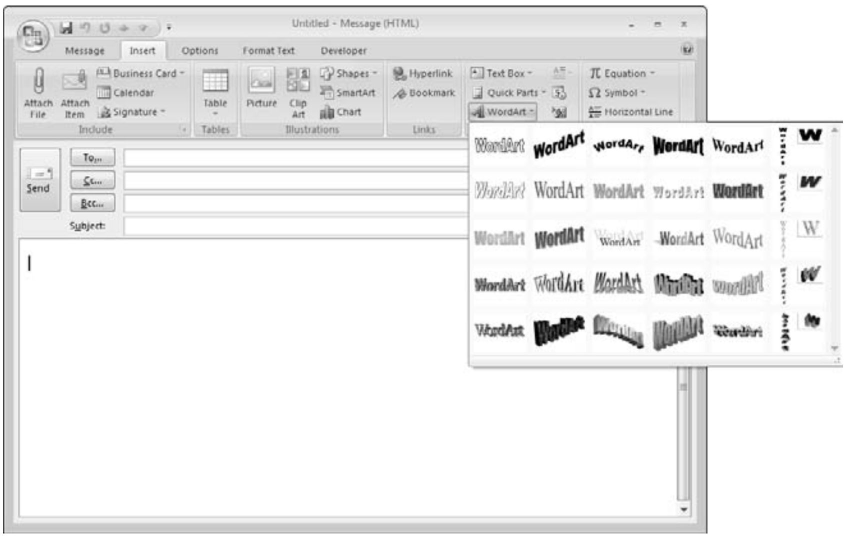


FIGURE 6.14

Entering the text for WordArt.

After you have inserted WordArt you can edit the text by right-clicking it and selecting Edit Text from the context menu.

Text Elements

Some of the objects you can insert into an email message are text-based. They are explained in this section.

Hyperlinks and Bookmarks

A hyperlink is a clickable link in an email message. It acts just like a hyperlink on a web page. A hyperlink can point to several types of targets:

- A bookmark that specifies a location in the current message. When the recipient clicks this kind of link, the message scrolls (if necessary) to bring the bookmark into view.
- A web page. When the recipient clicks this kind of link, the page opens in the default web browser (for example, Internet Explorer).
- An email address. When the recipient clicks this kind of link, a new email message is created with the address in the link inserted in the To field.
- A file. When the recipient clicks this kind of link, they are prompted to download the file. The file must be in an Internet or network location accessible to the recipient.

Inserting Symbols

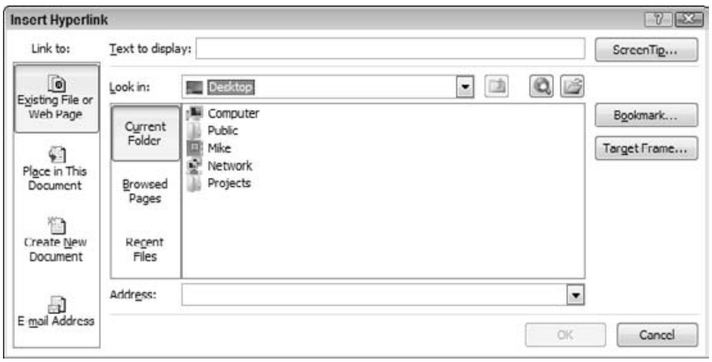
Symbols are not objects like the other elements discussed in this section — they are simply text characters that do not happen to be available on the keyboard, such as Greek letters, monetary symbols such as Yen and Pound, and letters with diacritical marks such as é and ö. To insert a symbol, click the Symbol button on the Insert ribbon and then click the desired symbol.

To add a hyperlink to an email message:

1. If the text that will be the hyperlink is already in the message, select it. If not, place the editing cursor at the desired location in the message.
2. Click the Hyperlink button on the Insert ribbon. Outlook displays the Insert Hyperlink dialog box, shown in Figure 6.15.

FIGURE 6.15

Entering a hyperlink in an email message.



3. If you selected text in step 1 it will be displayed in the Text to Display field. If not, enter it now.
4. On the left side of the dialog box, click the button that corresponds to the type of hyperlink you want to insert. Then:
   - If you select Existing File or Web Page, the dialog box will let you browse to the target file or page. You can also type in the address directly if you know it.
   - If you select Place in This Document, Outlook will display a list of bookmarks in the current message, from which you select the link target. You can also choose to link to the top of the message or to any headings in the message.

- If you select New Document, Outlook lets you enter the name of the new document and to specify whether to edit the document now (as soon as the link is inserted) or later. In either case, Word opens for editing the new document.
- If you select E-mail Address, Outlook lets you enter the email address and an optional subject for the message that will be created when the recipient clicks the link.

5. Click OK.

Hyperlinks are displayed by default as blue underlined text. You can change the target of a hyperlink by right-clicking it and selecting Edit Hyperlink from the context menu. To remove the link while leaving the text in the message, select Remove Hyperlink from the context menu.

To link to a location in your message, you must insert a bookmark. Here's how:

1. Place the editing cursor at the desired location in the message. Optionally you can select text at the location.
2. Click the Bookmark button on the Insert ribbon. Outlook opens the Bookmark dialog box.
3. If you selected text in step 1, it will be entered in the Bookmark Name field. You can accept this as the bookmark name or enter something else. If you did not select text in step 1, enter a unique name for the bookmark in this field.
4. Click OK.

Text marked as a bookmark does not display in any special way. It is just labeled "behind the scenes" as a bookmark.

To manage bookmarks, click the Bookmark button to display the Bookmark dialog box. Using this dialog box you can view existing bookmarks and delete ones you no longer need.

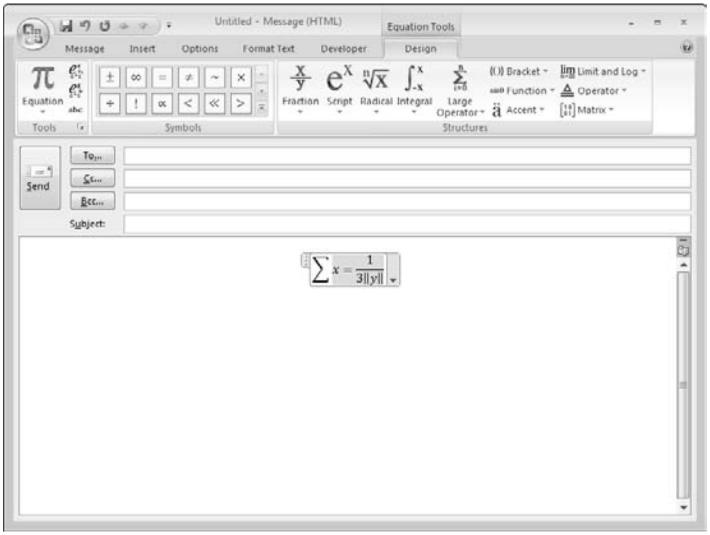
Equations

Outlook incorporates a powerful equation editor. Most of us will never need this, but if you are mathematically inclined you may find it useful. When you create an equation by clicking the Equation button on the Insert ribbon, Outlook enters a blank equation and displays the Design ribbon for equations. You can type equation elements directly into the equation box and also use the tools and commands on the ribbon. Figure 6.16 shows an equation being created in an email message.

When you send a message that includes an equation, the equation is converted to an image. The recipient can view the equation but not edit it.

FIGURE 6.16

Entering an equation in an email message.



Working with Tables

A table can be very useful for organizing and presenting information. Outlook provides you with several ways to create a table in an email message. You access these by clicking the Table button on the Insert ribbon.

Drawing a Table

When you click the Table button on the Insert ribbon, Outlook displays the menu shown in Figure 6.17. The quickest way to insert a table is to drag your mouse over the grid to highlight the desired number of table rows and columns. Outlook inserts a blank table of the specified size and you can start entering data.

Another way to draw a table is to select the Draw Table command on the Table menu. This command gives you more flexibility in creating a table with an unconventional row/column structure as shown in Figure 6.18.

FIGURE 6.17

Use the Table menu to insert a table into an email message.

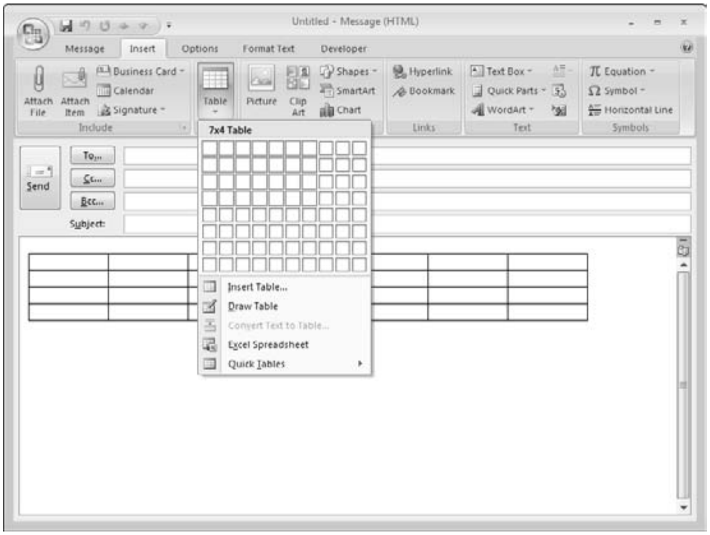
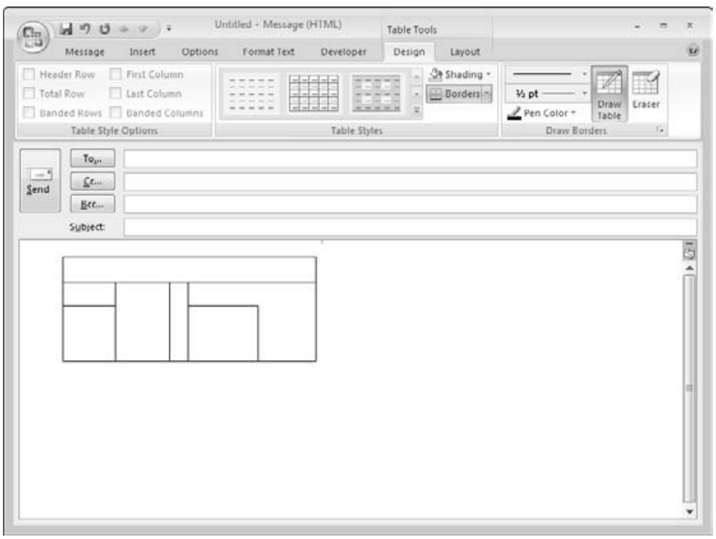


FIGURE 6.18

Use the Draw Table command to create a table with an unusual row/column structure.



When you select this command, the mouse pointer changes to a pencil icon when over the message body. You start by dragging in the message to define the outer boundary of the table. Then drag within the table to place vertical and horizontal lines to define cells. When you are finished, press Esc to exit table drawing mode.

Inserting a Table

You can also create a table using the Insert Table command on the Table menu. This command brings up the Insert Table dialog box, shown in Figure 6.19. Specify the number of columns and rows in the Table Size section, and then select one of the AutoFit options:

- **Fixed Column Width:** Select Auto to have column width set automatically based on the number of columns and the window width, or select a specific column width.
- **AutoFit to Contents:** The width of each column in the table automatically increases or decreases to fit the data that the column contains.
- **AutoFit to Window:** The width of the entire table adjusts to fit in the window width, and individual columns change accordingly.

If you select the Remember Dimensions for New Tables option, the size of the table (number of rows and columns) that you specify will be the new default the next time you display the Insert Table dialog box.

FIGURE 6.19

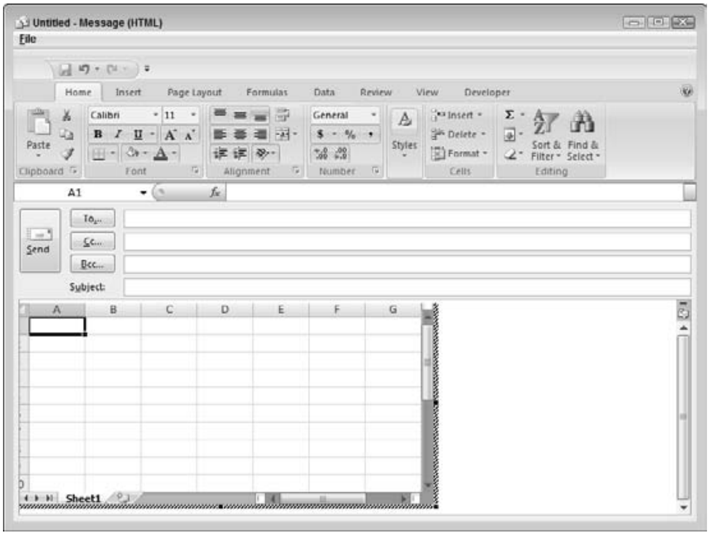
Inserting a table into an email message using the Insert Table command.

Creating a Table in Excel

One of the commands on Outlook's Table menu is Excel Spreadsheet. When you select this command, Outlook inserts a small, blank Excel spreadsheet in your message, as shown in Figure 6.20. You will also notice that the ribbons at the top of the message have changed to Excel commands. You can add data, text, formulas, and other elements to the spreadsheet just as if you were working in Excel — which, in effect, you are. Using this command requires that you have Excel installed on your system.

FIGURE 6.20

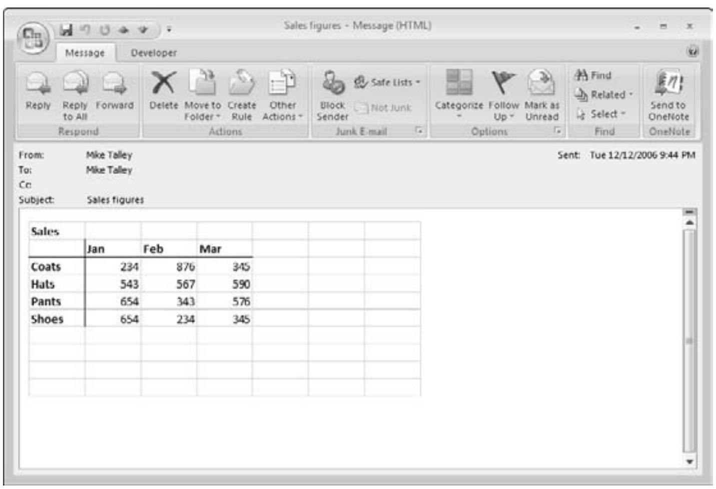
Adding a table to a message using Excel.



As soon as you click anywhere outside the spreadsheet, Outlook converts it to an image. You cannot change it in any way after this. You can add text and other elements to the message, address it, and so on. When you send the message the recipient receives the image as part of the message, as shown in Figure 6.21.

FIGURE 6.21

When you create a table using Excel, the message recipient gets an image of the table.



When you use this technique to create a table you cannot open an existing Excel spreadsheet inside the message — you are limited to what you can enter yourself. Nor can you save the spreadsheet that you create other than as an image. You can, however, open an existing spreadsheet in Excel and copy data to the spreadsheet in the message.

Converting Text to a Table

Outlook has the capability to look at regular — that is, non-table — text and convert it to a table. Each paragraph in the text becomes a row in the table. The text within the paragraph can be split up into columns based on tabs, commas, or another character that you specify. For example, Figure 6.22 shows text suitable for making into a table because the individual parts of each paragraph — last name, first name, and graduation year — are separated by commas. Figure 6.23 shows the table that was automatically created from this text.

FIGURE 6.22

Text suitable for automatic conversion to a table.

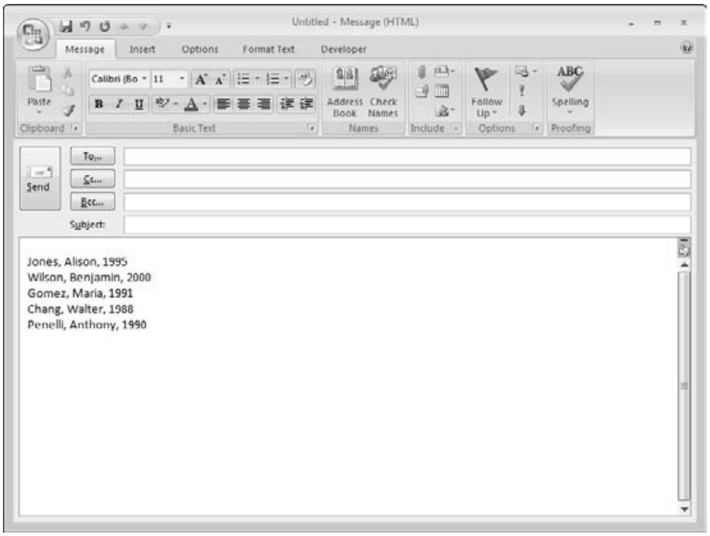
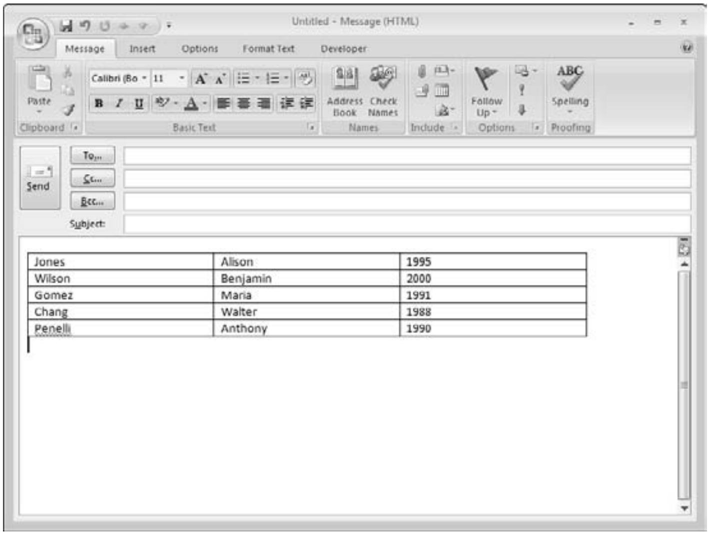


FIGURE 6.23

The table created from the text in Figure 6.22.



To convert text to a table:

1. Select the text.
2. Click the Table button on the Insert ribbon.
3. Select Convert Text to Table to display the Convert Text to Table dialog box (see Figure 6.24).

FIGURE 6.24

Specifying parameters for converting regular text to a table.

4. In the Separate Text At section, select the desired separator. If you select Other, enter the desired separator character in the adjacent box.
5. If the Number of Columns value is not correct, change it as needed. You cannot change the number of rows.
6. Select the desired AutoFit option. These options were explained earlier in the section “Inserting a Table.”
7. Click OK.

Using Quick Tables

Outlook’s Quick Tables feature lets you save tables you have created to a gallery. You can then insert the saved table into a message with a few clicks. A Quick Table is one of Outlook’s *building blocks*, a feature that lets you save not only tables but sections of text and other message components for reuse.

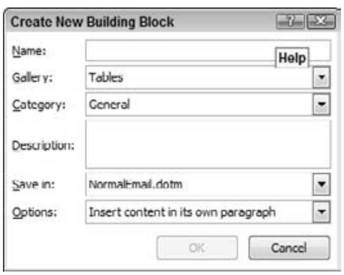
Saving a Quick Table

To save a table as a Quick Table you must first create the table and apply all the formatting that you want saved with it, such as borders, shading, and column headers. Any data in a table is saved too, so you probably want to save the table before you add the data. Then:

1. Select the entire table by dragging over it with the mouse.
2. Click the Table button on the Insert ribbon.
3. Select the Quick Tables command from the Insert Table menu, then select Save Selection to Quick Tables Gallery from the next menu. Outlook displays the Create New Building Block dialog box as shown in Figure 6.25.
4. Enter a name for the saved table in the Name box.
5. Select the category for the table from the Category list, or select Create New Category to create a new category.

FIGURE 6.25

Saving a table as a Quick Table.



6. Optionally, enter a description of the table in the Description box.
7. From the Options list, select how the table will be inserted: as a separate paragraph, as a separate page, or on its own.
8. Click OK.

Inserting a Quick Table

If you have saved one or more Quick Tables, you can insert one by clicking the Table button on the Insert ribbon and selecting Quick Tables from the menu. The next menu previews the available Quick Tables — simply click the one you want to insert into your message.

Proofing and Editing Tools

Outlook provides several tools to help you avoid errors in your email messages.

Checking Spelling and Grammar

Outlook provides spelling and grammar checkers that can help you find errors in your messages. After composing a message, run these tools by clicking the Spelling button on the Message ribbon or by pressing F7. For each misspelled word, the Spelling and Grammar dialog box is displayed, as shown in Figure 6.26. The error — in this case the misspelled word "watter" — is highlighted in the top part of the box and suggested corrections, if any, are listed in the bottom. Actions you can take are

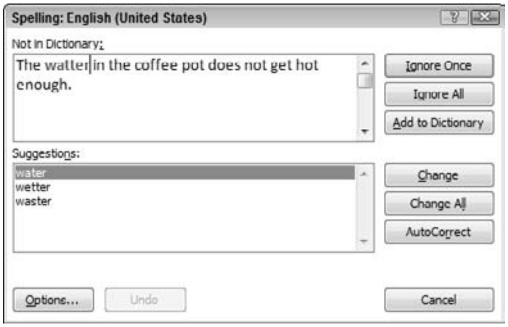
- **Ignore Once:** Ignore this instance of the error but catch any others.
- **Ignore All:** Ignore all occurrences of this error in the message.
- **Add to Dictionary:** Add the flagged word to the dictionary.
- **Change:** Change the flagged word to the correction selected in the Suggestions box.
- **Change All:** Change all occurrences of the flagged word to the selected correction.
- **AutoCorrect:** Change the flagged word to the selected correction and add the two words to the AutoCorrect list. AutoCorrect is covered later in this chapter.

When checking of grammar is enabled (I explain how to do this in a moment), sentence elements that Outlook thinks contain a grammar error are flagged and the Spelling and Grammar dialog box offers these options:

- **Ignore Once:** Ignore this instance of the error.
- **Ignore Rule:** Ignore the relevant grammar rule for the remainder of the grammar check.
- **Next Sentence:** Stop checking the current sentence and move to the next sentence.
- **Change:** Changes the text to the correction selected in the Suggestions box.
- **Explain:** Displays information about why this was flagged as a grammar error.

FIGURE 6.26

The spelling and grammar checker flags mistakes and suggests corrections.



If you are checking spelling only and want to enable grammar checking, select the Check Grammar option in the Spelling and Grammar dialog box. You can also turn this option on or off, along with other spelling and grammar options, as described in the next section.

Spelling and Grammar Options

To set spelling and grammar options, select Tools, Options from the main Outlook menu to open the Options dialog box and then click the Spelling tab. There are three elements on this tab:

- **Always Check Spelling before Sending:** Select this option if you want Outlook to check spelling (and grammar, if selected) each time a message is sent.
- **Ignore Original Message Text in Reply or Forward:** Select this option if you want the spelling/grammar checker to ignore quoted text when you reply to or forward a message.
- **Spelling and AutoCorrections:** Click this button to set additional spelling and grammar options. You can also display these other spelling and grammar options by clicking the Options button in the Spelling and Grammar dialog box.

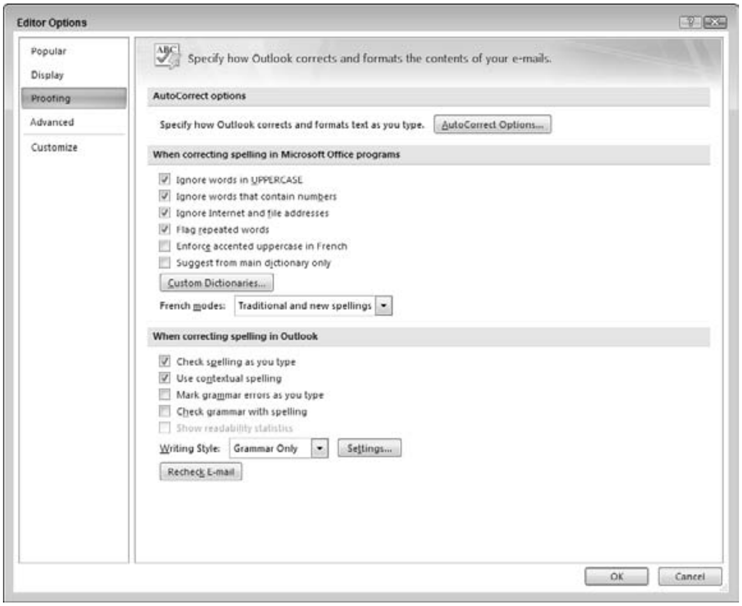
Don't Rely on the Spelling and Grammar Checkers

Outlook's spelling and grammar checkers are useful tools, but they are not perfect — far from it, in fact. They can be a help but are no replacement for your own skills and knowledge. Given the complexity of English grammar it is not surprising that the grammar checker makes frequent mistakes. And though the spelling checker can catch a lot of misspellings it cannot tell when you have, for example, used "there" instead of "their" or misspelled "so" as "do."

The spelling and grammar options are set in the Editor Options window as shown in Figure 6.27. The options in the top part of this window relate to spelling and grammar checking throughout Office (Outlook uses the same checker as the other Office programs). These are self-explanatory and you can set them as desired.

FIGURE 6.27

Setting the spelling and grammar options.



The other options relate to Outlook only and are as follows:

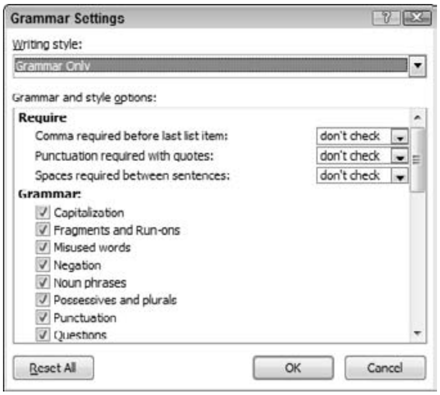
- **Check Spelling as You Type:** Outlook detects misspelled words as you type and marks them with a red wavy underline.
- **Use Contextual Spelling:** If you select this option, the spell checker will attempt to detect errors based on context. For example, "there" is a legitimate word but is wrong in this sentence (it should be "their"): "Linda told me that there vacation was a lot of fun."
- **Mark Grammar Errors as You Type:** Outlook detects grammar errors as you type and marks them with a green wavy underline.
- **Check Grammar with Spelling:** Always checks grammar when you do a spelling check.
- **Show Readability Statistics:** Select this option to view readability statistics that use the average number of syllables per word and the average number of words per sentence to

determine the grade-level readability. For example, a score of 8 indicates that the document should be understandable by someone with an 8th grade education. You must select the Check Grammar with Spelling option to enable the Show Readability Statistics option.

- **Writing Style:** You can choose to check grammar only or both grammar and style. Click the Grammar Settings button to display the Grammar Settings dialog box (see Figure 6.28) where you specify the details of how grammar is checked.
- **Recheck E-mail:** If you have changed any options while in the midst of a spelling/grammar check, resets the checker to start over from scratch.

FIGURE 6.28

Setting options for how grammar and style are checked.



When you have turned on the options to check grammar and/or spelling as you type, Outlook underlines errors as it detects them in the message. When you right-click an error that's flagged in this manner, Outlook displays a context menu with commands relevant to the error. For example, the menu displayed when you right-click a misspelled word offers Ignore, Ignore All, and Add to Dictionary commands as well as any suggested replacements the spell checker has found.

The Writing Style Option

A known Outlook bug prevents you from setting Writing Style options when you display the Editor Options via the Tools, Options command (as described earlier). You have to open the item you want to check, click the Office button at the top-left corner, select Editor Options from the Office menu, and then select Proofing.

AutoCorrect

AutoCorrect is a feature that detects certain things in text you are typing and automatically changes them to something else. When enabled, AutoCorrect can:

- Correct typing errors, such as when you mistakenly start a word with TWo INitial CApitals.
- Insert symbols and other special characters automatically, such as replacing (c) with ©.
- Automatically correct spelling errors you make frequently, such as replacing "abuot" with "about."
- Ease entry of long words that you use frequently, such as replacing "Alb" with "Albuquerque."

AutoCorrect options are accessed as follows:

1. Select Tools, Options from the main Outlook menu to display the Options dialog box.
2. Click the Spelling tab.
3. Click the Spelling and AutoCorrection button to open the Editor Options window.
4. Click the AutoCorrect Options button.

The AutoCorrect options are shown in Figure 6.29. The options near the top of this dialog box are self-explanatory. Click the Exceptions button to view and define exceptions to the various AutoCorrect rules. For example, if you have the Correct TWo INitial CApitals option turned on, you can specify that "IDs" not be corrected.

FIGURE 6.29

Setting the AutoCorrect options.

The lower section of the AutoCorrect dialog box deals with replacing text as you type. If the option is turned on, each text item in the left column of the list will automatically be replaced with the corresponding text item in the right column. You work with this list as follows:

- To add an item, enter the text to be replaced in the Replace field and the replacement text in the With box, then click Add.
- To remove an item, select it in the list by clicking and then click the Delete button.
- To modify an item, select it in the list by clicking and then edit the Replace and With fields as desired.

Other "Auto" Features

Outlook provides several other tools that can help you when you are composing the body of an email message.

Math AutoCorrect

Math AutoCorrect is like regular AutoCorrect but it works with mathematical and other symbols. It works mostly with keywords preceded by a backslash — for example, \approx is replaced with ⊕. By default, Math AutoCorrect works only within math regions, a section of a message designed specifically for entering mathematical equations. To insert an equation into a message:

1. Place the editing cursor at the location in the message where you want the equation.
2. Click the Symbols button on the Insert ribbon.
3. Select Equation from the menu. Outlook inserts a math region into the message and displays a Design ribbon that offers various tools for working with equations (see Figure 6.30).
4. Enter and edit the equation as needed.
5. Click outside the math region to work on other parts of the message. Click the math region again to edit the formula.

To set Math AutoCorrect options:

1. Select Tools, Options from the main Outlook menu to display the Options dialog box.
2. Click the Spelling tab.
3. Click the Spelling and AutoCorrection button to open the Editor Options window.
4. Click the AutoCorrect Options button to display the AutoCorrect dialog box.
5. Click the Math AutoCorrect tab (shown in Figure 6.31).

FIGURE 6.30

Entering an equation into an email message.

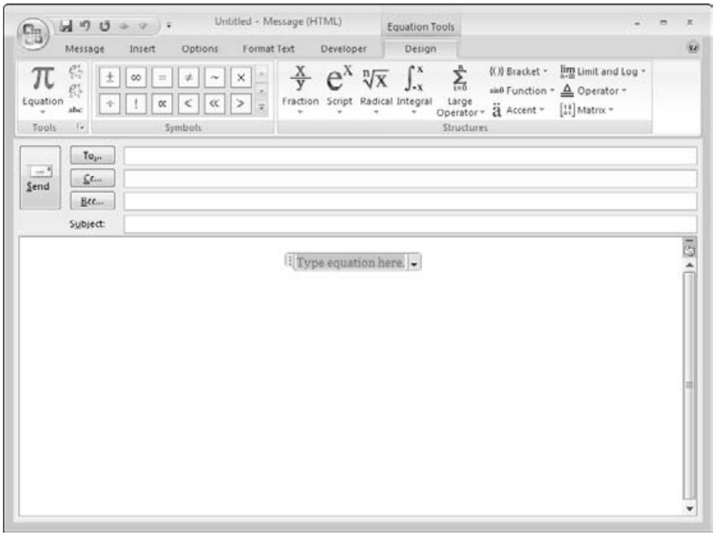


FIGURE 6.31

Setting Math AutoCorrect options.

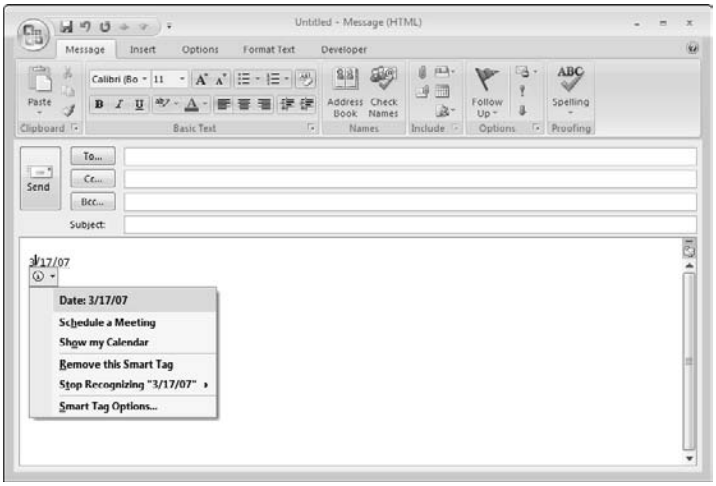
The first option, Use Math AutoCorrect Rules Outside of Math Regions, determines whether these rules apply just in math regions or throughout the entire message. The Replace Text as You Type option determines whether Math AutoCorrect is on or off. You add items to and delete items from the list as described for AutoCorrect in the previous section.

Smart Tags

Smart Tags is a tool that lets Outlook recognize certain types of information in your messages, such as dates and telephone numbers. Then, Outlook marks the item with a dotted underline and, when the mouse cursor is near the item, displays a Smart Tag, or small button, next to the item. Clicking the Smart Tag displays a menu of commands relevant to the type of data item. For example, if the item is a date, the commands on the Smart Tag menu let you schedule a meeting, open your calendar, and so on. This is shown in Figure 6.32.

FIGURE 6.32

Smart Tags provide quick access to commands for certain data items in a message.



To set Smart Tag options:

1. Select Tools, Options from the main Outlook menu to display the Options dialog box.
2. Click the Spelling tab.
3. Click the Spelling and AutoCorrection button to open the Editor Options window.
4. Click the AutoCorrect Options button to display the AutoCorrect dialog box.
5. Click the Smart Tags tab (shown in Figure 6.33).

FIGURE 6.33

Setting Smart Tag options.

The option at the top of this dialog box, Label Text with Smart Tags, turns Smart Tags on or off. If this option is on, the types of data selected in the Recognizers list will be detected and marked with a tag.

AutoFormat

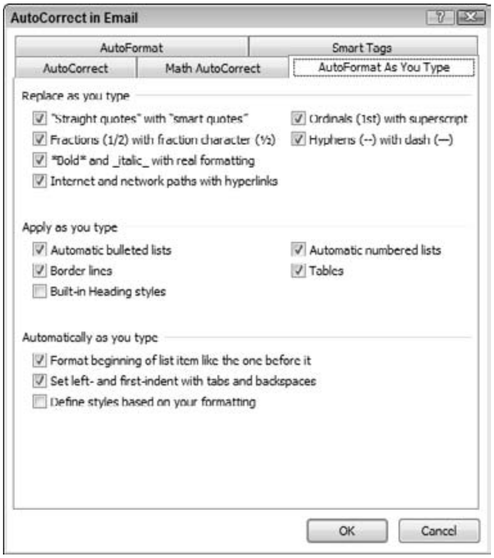
The AutoCorrect dialog box contains two tabs that control automatic formatting — the AutoFormat As You Type tab and the AutoFormat tab. The items on these tabs are similar in concept — Figure 6.34 shows the AutoFormat As You Type tab. You can turn these options on or off as suits your working style.

Checking Names

The Check Names command, located on the Message ribbon, verifies that the recipients of your message are all valid email addresses. *Valid* in this context does not mean that there is a working email account with the specified address, only that the address has the proper format (xxxx@yyyy.zzz). If all the recipients pass the test, no message is displayed. If possible, Outlook will correct the address. Otherwise you will see a dialog box in which you can select a recipient to make changes to the address.

FIGURE 6.34

Setting AutoFormat options.



Other Tools

The Editing button on the Format Text ribbon gives you access to the following features.

Find, Replace, and Go To

Selecting Find from the Editing menu (click the Editing button on the Format Text ribbon) displays the dialog box shown in Figure 6.35. You can see it has three tabs, one for each of the three functions discussed in this section.

The Find tab lets you locate text in your message. Enter the search text in the Find What field and then:

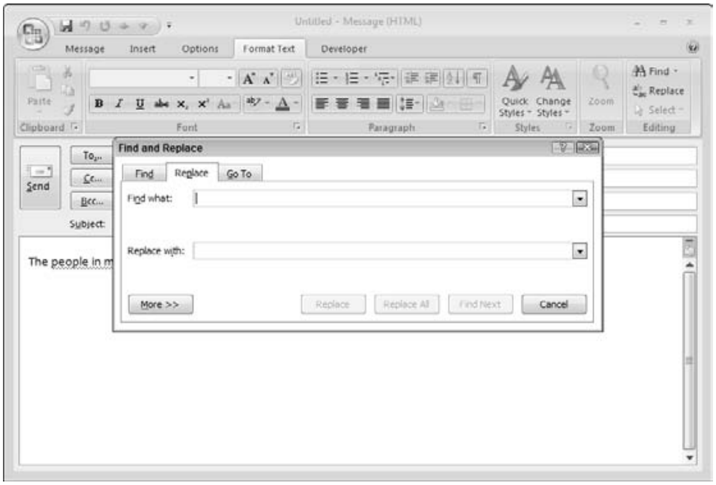
- Click Find Next to highlight the next occurrence of the text in the message.
- Click Find All to highlight all occurrences of the text in the message.
- Click More to display additional search options such as matching case, finding whole words only, and finding formatting.

The Replace tab lets you locate specified text in the message and replace it with other text. It works the same as the Find tab except that in addition to a Find What field there is a Replace With field for you to enter the replacement text.

The Go To tab lets you quickly move to various locations in your message. This tool is useful primarily with long messages. You can, for example, move to a specified page number or table.

FIGURE 6.35

The Find and Replace dialog box.



Summary

The days when email messages consisted of nothing but plain text are long gone. Outlook provides you with a rich set of tools for creating attractive email messages with complex formatting, embedded images and tables, and other elements to help you get your message across in the most effective way. Then, you can use Outlook's powerful proofing tools to catch errors before you send the message.

Chapter 7

Understanding Email Options

IN THIS CHAPTER

- Setting options for individual messages
- Setting global email options

Although it's possible to create and send email messages using all of Outlook's default settings, you would be missing a lot of flexibility and convenience if you did so. The various email options that Outlook offers let you use email in the way that is most convenient and productive for you. These options fall into two categories: those that apply to a single message and those that apply globally. These are covered in turn. A third category of options, those that apply to an individual email account, was covered in Chapter 3.

Setting Options for Individual Email Messages

This section explains a variety of options available for individual email messages that you create.

Changing the Send Account

This is relevant only if you have two or more email accounts. By default, messages are sent as follows:

- Messages you create from scratch are sent using the default email account.
- Messages that are replies to a message you received are sent using the account through which the original message was received.
- Messages you forward are sent using the account through which the original message was received.

Changing the Default Email Account

To change the default email account:

1. Select Tools, Account Settings from the main Outlook menu to display the Account Settings dialog box.
2. If necessary, click the E-mail tab.
3. The current default account is indicated in the account list by (send from this account by default).
4. Click another account in the list.
5. Click the Set as Default button.
6. Click Close.

To change the send account for a message:

1. Click the Account button on the Message ribbon. A menu is displayed with the current send account checked.
2. Select the desired account from the menu.

Saving Sent Items

By default, email messages that you send are saved in the Sent Items folder. You can change this location for an individual message as follows:

1. Click the Save Sent Item button on the Options ribbon.
2. To save the item to a folder other than the default, click Other Folder and select the folder.
3. To not save the item at all, click Do Not Save.

Sending Items with a Message

You learned in Chapter 4 how you can attach a file to a message. Outlook also lets you attach certain items, specifically calendars and business cards, to a message.

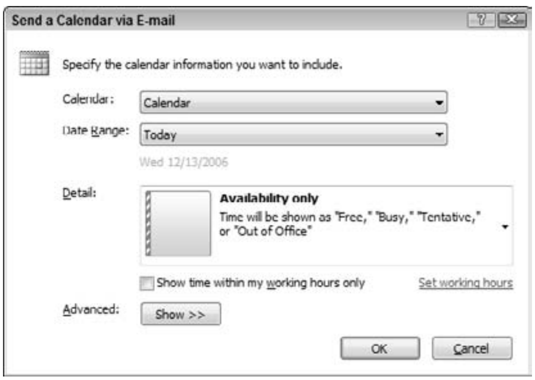
Sending a Calendar

Sending calendar information with a message can be useful to let colleagues know when you are and are not available for a meeting. To send calendar information with an email message, click the Calendar button in the Include section of the Message ribbon. Outlook displays the Send a Calendar via E-mail dialog box, shown in Figure 7.1. You make entries in this dialog box to specify the calendar information that will be sent, as follows:

1. If you have more than one calendar, select the calendar to use from the Calendar list.
2. Select the date range from the Date Range list. Predefined ranges include Today, Tomorrow, and Next 7 Days. Select Specify Dates from the list to enter a custom date range.
3. From the Detail list, select the level of calendar detail that you want included in the message. The choices are
   - **Availability Only:** Time will be shown as Free, Busy, Tentative, or Out of Office.
   - **Limited Details:** In addition to availability, this option includes the subjects of calendar items.
   - **Full Details:** In addition to availability, this option includes the full detail of calendar items.
4. Select the Show Time within My Working Hours Only option to limit the sent calendar information to these hours. By default they are 8:00 AM to 5:00 PM Monday–Friday. Click the Set Working Hours link to change this.
5. Click the Show button to display three additional options. Two of them relate to what information is included in the message. These options are relevant only if you selected Limited Details or Full Details. The third option determines the format of the sent calendar: Daily Schedule or List of Events. See the main text for information on these two layouts.
6. Click OK to close the dialog box and insert the calendar information in the message.

FIGURE 7.1

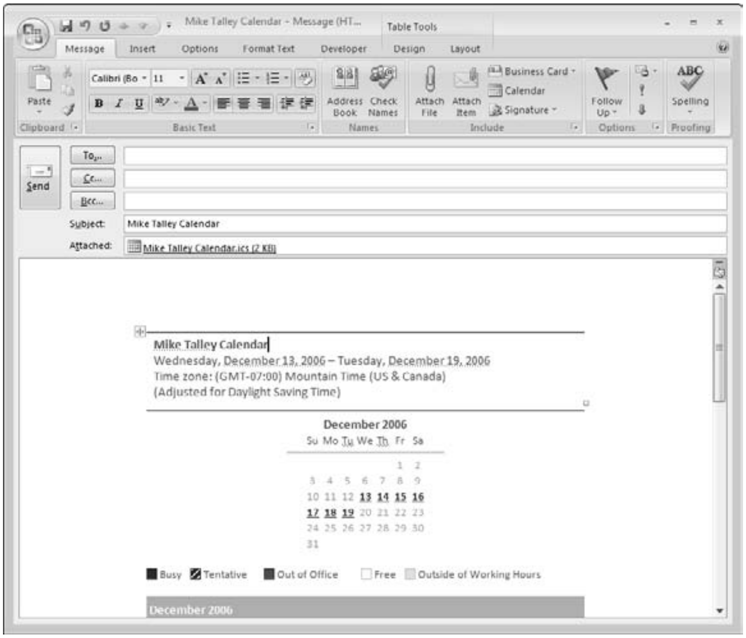
Sending calendar information in an email message.



When calendar information is inserted in an email message, at the top is a calendar of the month or months involved with the relevant days highlighted and underlined, as shown for July 13–19 in Figure 7.2. The recipient can click these days to go to the detail section for that day.

FIGURE 7.2

This part of the calendar information includes links to individual days.



If the calendar information was sent using the Daily Schedule option, the details appear as shown in Figure 7.3. You can see that blocks of time during each day are marked as Free, Busy, and so on.

If the calendar information was sent using the List of Events option, the details appear as shown in Figure 7.4. This option lists specific calendar events only — free time is not explicitly marked.

Sending a Business Card

A business card is just what it sounds like — an electronic representation of the information normally found on a paper business card. Every entry in a contacts list automatically has a business card created for it. You can insert these cards into email messages to send contact information to email recipients. When you do so, a visual representation of the business card is added to the message and a VCF file is attached to the message. The recipient can use the VCF file to quickly add the contact information to his or her own contacts list.

FIGURE 7.3

Display of calendar details when the Daily Schedule option is used to send the calendar.

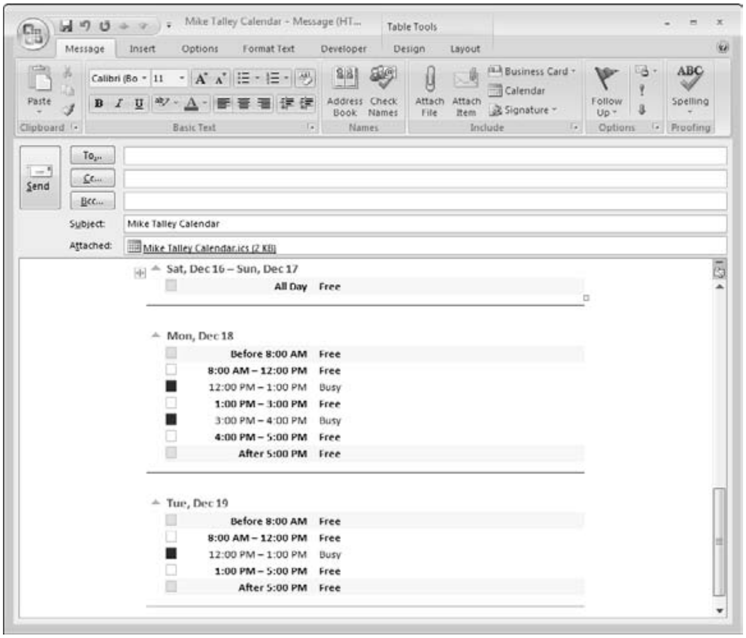


FIGURE 7.4

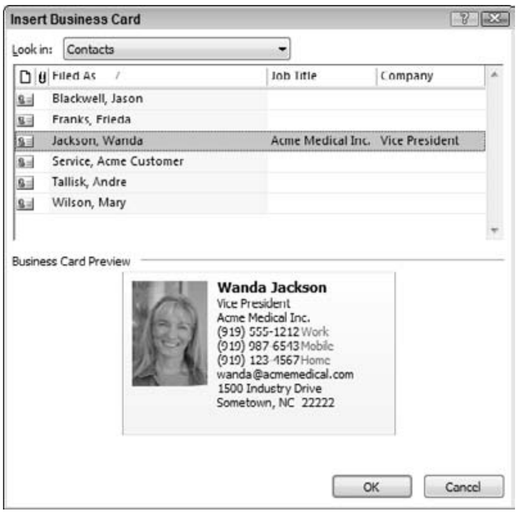
Display of calendar details when the List of Events option is used to send the calendar.

To send a business card with an email message:

1. Click the Business Card button in the Include section of the Message ribbon.
2. The menu that is displayed lists recently sent business cards. Select the one you want to send, or select Other Business Cards to select from your contacts list.
3. If you selected Other Business Cards, Outlook displays the Insert Business Card dialog box as shown in Figure 7.5.
4. If you have more than one address book, select the desired one from the Look In list.
5. Click the contact whose business card you want to include. The card is previewed in the lower part of the dialog box.
6. If you want to include more than one card, hold down Ctrl while clicking.
7. Click OK

FIGURE 7.5

Selecting a business card to include in an email message.



Your Own Business Card

If you create an entry for yourself in your contacts list, you can send your own business card with email messages.

Setting Message Importance and Sensitivity

An email message can be flagged as having low importance or high importance. Low is the default. The recipient's email program may indicate the importance of a message in some way. For example, Outlook displays an exclamation point next to the message in the Inbox if it is marked as having high importance. Many email clients, including Outlook, also allow recipients to sort their received messages by importance.

To mark a message with high importance, click the High Importance button (a red exclamation point) in the Options section of the Message ribbon. To return a message to the default setting of low importance, click the Low Importance button (a downward-pointing arrow).

Setting Message Restrictions

Message restrictions, or permissions, let you restrict who can view your email messages and what they can do with them (for example, can the message be forwarded?). This feature, which is applicable to all Office documents as well as email messages, is part of Information Rights Management, or IRM.

IRM is based on the concept of ***credentials***. To create rights-restricted content, such as an email message, you must possess appropriate credentials to associate with the message. The recipient must also possess the appropriate credentials to view or take other actions with the content.

IRM requires that both the creator and the recipient of restricted content be subscribed to an IRM server. Many people use the Windows Right Management (WRM) service, which at present is free (but with no guarantee that Microsoft will continue the service indefinitely). WRM uses .Net Passport as a means of verifying identities and validating credentials. Some companies use their own IRM server or one provided by a third party.

The steps described in this section assume that you have a rights management client installed on your computer and have set up the necessary credentials.

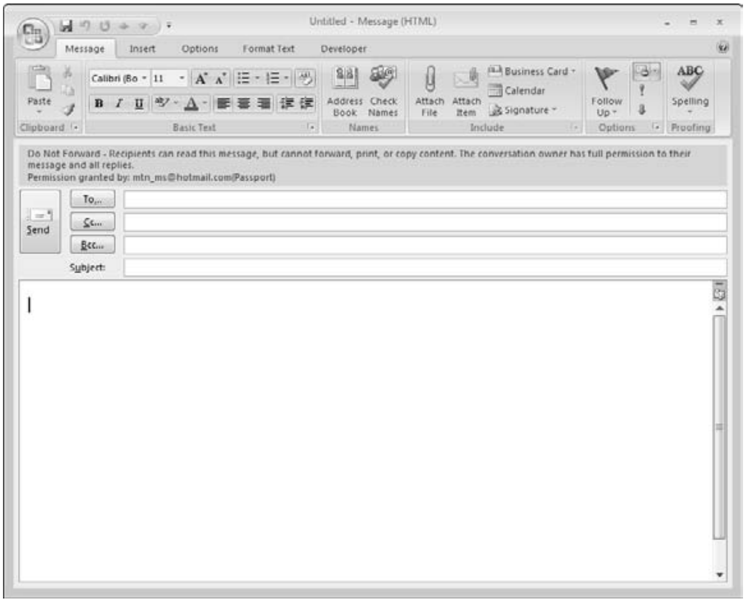
By default, email messages are created with no restrictions. You can add a Do Not Forward restriction by clicking the Permissions button on the Message ribbon and selecting Do Not Forward from the menu. This button will be displayed only if you are set up for IRM. This restriction permits the recipient to view the message if they have the required credentials, but not to forward, print, or copy the message.

You may be asked which credentials to use for this message (it's possible for an individual to possess multiple credentials). When a message you are composing is restricted it displays a banner below the ribbon describing the restrictions, as shown in Figure 7.6.

If you attach a document, workbook, or presentation to a message, the restricted permissions of the message will be applied to the attachments as well. If the attachment has already had restrictions set in the originating program (Word, Excel, or PowerPoint) those restrictions also remain in effect.

FIGURE 7.6

A message that has restrictions applied displays a notification of that fact below the ribbon.



You may also have custom restrictions available to you. In a company, the IT department may have defined a restriction level that restricts contents to people on the company network. Your IT person can provide you with information on custom restrictions if they are in use in your organization.

Flagging a Message for Follow-Up

Sometimes, when you send a message, you would like to be reminded to follow up on the message — for example, to make sure that you have received a reply. You can flag a message for follow up and, optionally, have Outlook remind you. Here's how.

1. Click the Follow Up button on the Message ribbon. Outlook displays the menu shown in Figure 7.7.
2. To flag for follow up at one of the predefined times (for example, tomorrow or next week), click the corresponding command on the menu.
3. To specify a custom time, click the Custom command. Outlook displays the Custom dialog box as shown in Figure 7.8.
4. Make sure the Flag for Me option is selected.
5. From the Flag To list, select the type of follow up (for example, follow up, reply, and so on).
6. Enter the desired start and due dates in the corresponding fields. Click the down arrow next to each field to select from a calendar.

7. If you want Outlook to remind you of this item, select the Reminder option and enter the date and time in the adjacent fields.
8. Click OK.

FIGURE 7.7

Flagging a message for follow-up.

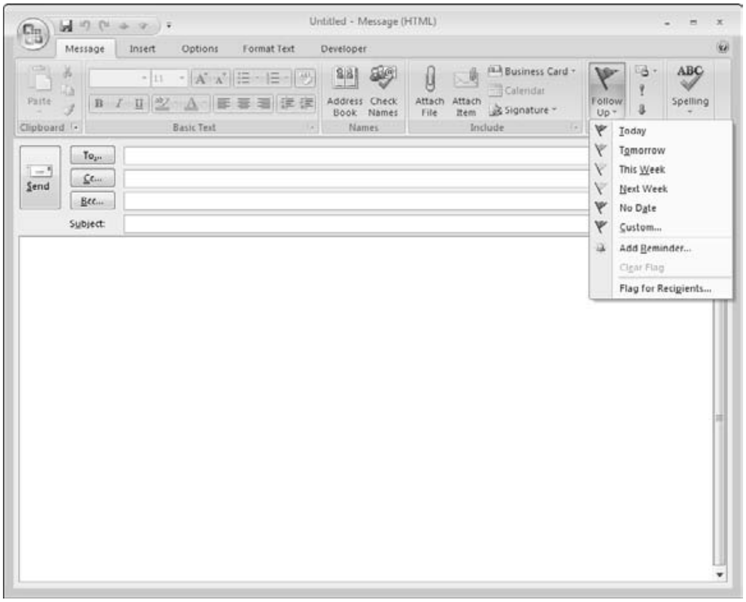
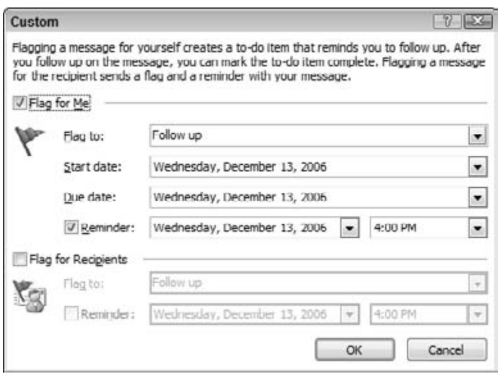


FIGURE 7.8

Specifying a custom follow-up interval.



You can also flag a message for the recipient. All you need to do is select Flag for Recipients from the Follow Up menu (see Figure 7.7) and then enter the relevant information in the lower part of the Custom dialog box (see Figure 7.8).

When an Outlook user receives a message with such a flag, the flag status column in the Inbox will display a special icon indicating that there is follow-up information included with the message. The user can right-click this icon to add the message to his or her to-do list. Email programs other than Outlook may ignore this information or handle it differently.

Assigning a Message to a Category

Outlook's categories are a powerful tool for organizing all kinds of information. Categories are covered in more detail in Chapter 17. When you create a message, you can assign it to a category. Then you'll be able to find the message — the saved copy of the sent message, that is — based on this category. To assign a category to a message:

1. Click the dialog box launcher in the More Options section of the Options ribbon to display the Message Options dialog box.
2. At the lower left of the dialog box, click the Categories button.
3. Select the desired category from the menu. Or, click Clear All Categories to remove any category assignment from the message.

Requesting Delivery and Read Receipts

When you send a message you can request delivery and/or read receipts by selecting the corresponding option in the Tracking section of the Options ribbon. A delivery receipt is generated when the message is delivered to the recipient, and a read receipt is generated when the message is opened by the recipient. The receipt consists of an email message back to you that contains the date and time that the original message was delivered or read.

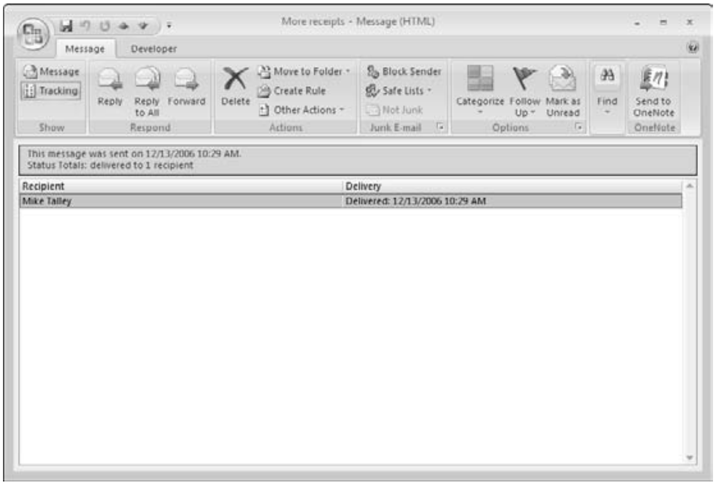
Delivery and read receipts sound like a great idea but their usefulness in practice is limited. The delivery receipt must be generated by the email server software, and sometimes this feature is turned off by the server administrator to reduce the load on the server. Even if you do receive a delivery receipt, there is no guarantee that the recipient has read the message. Likewise, the read receipt is sent by Outlook (or whatever other email program the recipient is using), and the user may have this feature turned off.

When you have sent a message and requested a receipt, Outlook automatically processes the receipt(s) when and if they arrive (unless you have turned this feature off under Tracking Options, as explained later in this chapter). When you open the message in the Sent Items folder, the ribbon displays a Show section with Message and Tracking buttons (see Figure 7.9). Click the Tracking button to view the details of the receipt(s) received for this message. Click the Message button to return to the message text.

Be aware that if Outlook has not yet received and processed any receipt for a message, the Tracking button will not be available on the ribbon.

FIGURE 7.9

Viewing the tracking status of a message.



Delaying Delivery

If you do not want a message delivered right away, you can specify a "do not deliver before" date, as follows:

1. Click the Delay Delivery button in the More Options section of the Options ribbon. Outlook displays the Message Options dialog box (see Figure 7.10).
2. In the Delivery Options section, turn on the Do Not Deliver Before option.
3. Enter the desired date and time in the adjacent fields.
4. Click the Close button.

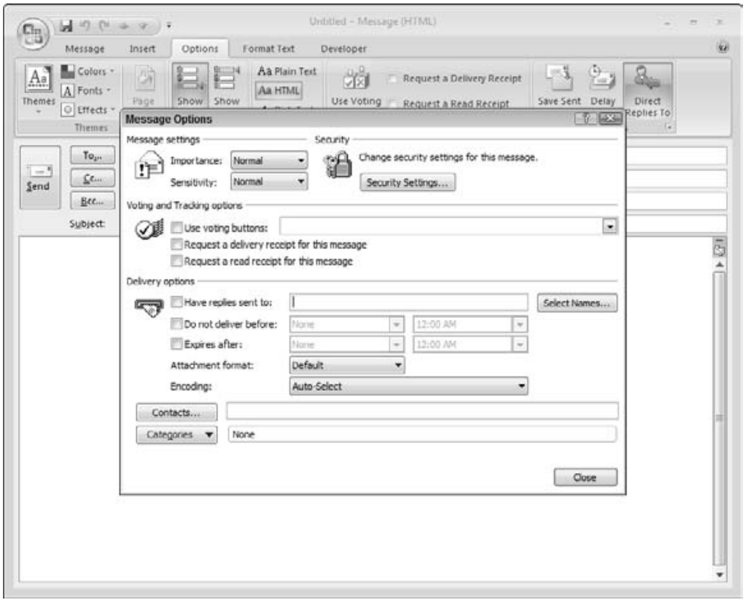
If you are using a Microsoft Exchange email account, the message will be sent to the server and held there until the specified date and time. If you are using another kind of email account, the message will be held in Outlook's outbox until the first send operation that occurs after the specified date and time.

Setting a Message Expiration Date

If you are sending a message relevant for only a limited period, you can set an expiration date for the message. When the recipient receives the message, it will behave normally until the expiration date, after which it will display in the Inbox (or whatever folder it is in) with a line through the header. The recipient can still open the message, but the strikethrough provides a visual indication that the message has expired. Other email programs may handle message expiration differently.

FIGURE 7.10

Delaying the delivery of a message.



To set an expiration date:

1. Click the dialog box launcher in the Options section of the Message ribbon. Outlook displays the Message Options dialog box (shown previously in Figure 7.10).
2. In the Delivery Options section of the dialog box, turn on the Expires After option.
3. Enter the desired expiration date and time in the adjacent fields.
4. Click Close.

Using Signatures

Outlook lets you define signatures that can be quickly added to an email message. You can have multiple signatures; one for business use and another for personal messages, for example. Creating signatures is covered in Chapter 5, as is defining a default signature that is automatically added to all messages. To manually add a signature to a message, click the Signature button in the Include section of the Message ribbon and select the desired signature from the menu. If you have not defined any signatures, none will be listed here.

Setting Global Email Options

A number of Outlook's options apply globally to all messages and to email in general. You select these options using several dialog boxes, which display the options in related groups. This section follows the same organization.

Mail Preferences

To view and change email preferences:

1. Select Tools, Options from the main Outlook menu to display the Options dialog box.
2. If necessary, click the Preferences tab.
3. At the top of this dialog box, click the E-mail Options button. Outlook displays the E-mail Options dialog box (see Figure 7.11).
4. Set options in this dialog box as explained next.
5. Click OK.

FIGURE 7.11

Setting global email preferences.

The options in the Message Handling section of this dialog box are as follows:

- **Close Original Message on Reply or Forward:** When you select Forward or Reply in a message that you received, the original message is closed.
- **Save Copies of Messages in Sent Items Folder:** When you send a message, a copy is saved in the Sent Items folder (recommended!).
- **Automatically Save Unsent Messages:** Messages you have started composing but not sent are saved in the Drafts folder.
- **Remove Extra Line Breaks in Plain Text Messages:** Unneeded line breaks are stripped from plain text messages.
- **Shade Message Headers when Reading Mail:** When you are reading a message that contains quoted components, Outlook will use subtle shading to mark the quoted section (this does not always work properly, I have found).
- **Advanced E-Mail Options:** Click this button to view and set advanced email options (explained in the following section).
- **Tracking Options:** Click this button to view and set tracking options (explained later in the chapter).

The On Replies and Forwards section of this dialog box determines what Outlook does when you reply to a message or forward a message. You set each independently but the options are essentially the same:

- **Do Not Include Original Message:** Replies are sent without the original message. Not applicable to forwarded messages.
- **Attach Original Message:** Replies and forwards are sent with the original message included as an attachment.
- **Include Original Message Text:** Replies and forwards are sent with the original message included as part of the new message.
- **Include and Indent Original Message Text:** Replies and forwards are sent with the original message included as part of the new message, indented with respect to the other parts of the message.
- **Prefix Each Line of the Original Message:** Replies and forwards are sent with the original message included as part of the new message, with each line of the original message prefixed by what is entered in the Prefix Each Line With field (by default this is >).

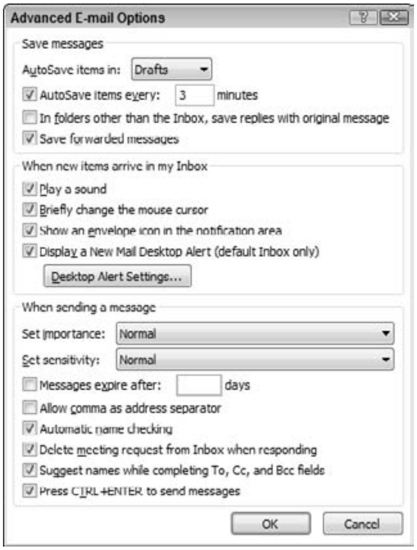
The final option in this dialog box is Mark My Comments With. You use this option when you prefer to reply to or forward messages with your comments included along with the original message text. When this option is selected, your comments are each preceded by your name (or whatever you specify) in brackets.

Advanced Email Options

When you click the Advanced Email Options button in the E-mail Options dialog box, Outlook displays the dialog box shown in Figure 7.12.

FIGURE 7.12

Setting advanced email options.



Most of these options are self-explanatory so I will not go into details. The few that may require explanation are

- **AutoSave Items In:** Specifies the folder when Outlook autosaves items (for example, messages you have started composing but not yet sent).
- **In Folders Other Than the Inbox...:** When you reply to a message that is located in any folder other than the Inbox, your reply is saved in that folder rather than in the Sent Items folder. This can help to keep related messages together.
- **Display a New Mail Desktop Alert:** When a new message arrives, Outlook displays a small, semitransparent preview of the message in the lower-right corner of your screen. Click the Desktop Alert Settings button to specify the details of how this alert appears.
- **Set Importance/Sensitivity:** Specifies the default importance and sensitivity levels for new messages you create.

Tracking Options

If you click the Tracking Options button in the E-mail Options dialog box, Outlook displays the dialog box shown in Figure 7.13.

FIGURE 7.13

Setting email tracking options.

The options in the top portion of this dialog box determine how Outlook handles requests for read and delivery receipts and receipts that have been returned to you:

- **Process Requests and Responses on Arrival:** When a read or delivery receipt is received, Outlook records the receipt as part of the original item (the sent message).
- **Process Receipts on Arrival:** Receipts are deleted on arrival (after processing).
- **After Processing, Move Receipts To:** Specify a folder for saving processed receipts.

In the middle of this dialog box are options that you can set if you want every message you send to include a request for a delivery and/or read receipt.

At the bottom of the dialog box you can specify how Outlook handles requests for receipts that you receive.

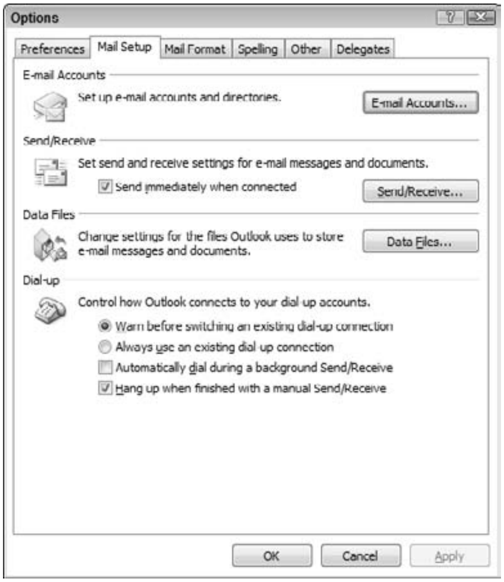
Mail Setup

To access the Mail Setup dialog box, select Tools, Options from the main Outlook menu and click the Mail Setup tab in the Options dialog box. This tab is shown in Figure 7.14.

The E-mail Accounts button lets you access Outlook's email accounts to add, delete, or modify accounts. Working with email accounts was covered in Chapter 3.

FIGURE 7.14

The Mail Setup tab in the Options dialog box.



The Send Immediately When Connected option specifies that a message you create and send is sent immediately rather than being put in the Outbox and sent the next time a send/receive operation takes place. If you click the adjacent Send/Receive button, Outlook opens a dialog box where you can specify how often Outlook performs an automatic send/receive. The default is 30 minutes.

If you click the Data Files button on the Mail Setup tab, Outlook opens a dialog box where you can change settings related to the data files that Outlook uses to store information (messages, calendar, and so on). This topic is covered in Chapter 18.

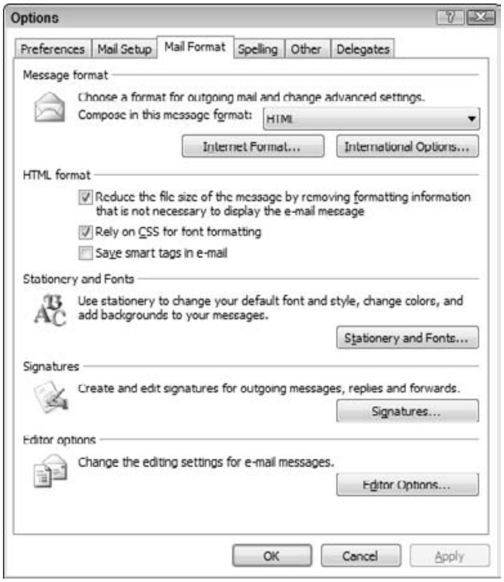
The final group of options on the Mail Setup tab are relevant only if you are using a dial-up (modem) connection to the network. For most users, the default settings are fine and need not be changed.

Mail Format

To access the Mail Format dialog box, select Tools, Options from the main Outlook menu and click the Mail Format tab in the Options dialog box. This tab is shown in Figure 7.15.

FIGURE 7.15

The Mail Format tab in the Options dialog box.



The Message Format section of this dialog box has the following elements:

- **Compose in this Message Format:** Select the default format (HTML, Rich Text, or plain text) for new messages. See Chapter 5 for details.
- **Internet Format:** Click this button to specify that messages you create in RTF format are converted to HTML or plain text when being sent to Internet mail accounts (which generally cannot read RTF messages).
- **International Options:** Click this button to set language options for new messages.

The HTML Format section has these options:

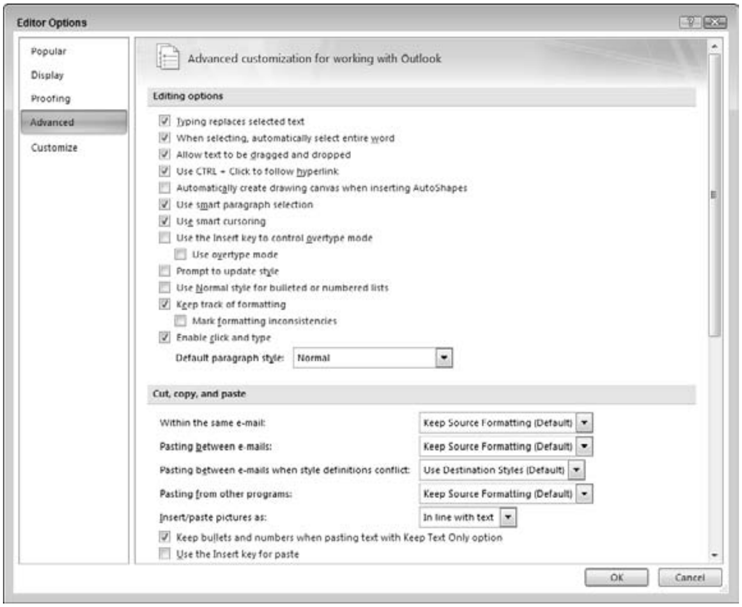
- **Reduce the File Size...:** Make HTML messages as small as possible by removing unneeded formatting information.
- **Rely on CSS for Font Formatting:** Select this option if you want to use Cascading Style Sheets for font formatting.
- **Save Smart Tags in Email:** Smart Tags are sent as part of a message rather than being present only while you are composing the message.

The Stationery and Fonts button and the Signatures button give you access to the tools for creating and modifying these items, specifying the defaults to use with new messages, and so on. Stationery and signatures are covered in Chapter 5.

Click the Editor Options button to display the window shown in Figure 7.16. You use this window to set a variety of options that control how the email editor works. Note the list of categories on the left. Click each one to display a different set of related options.

FIGURE 7.16

Setting options for the email editor.



Many people use Outlook without ever making changes to any of these options, but they are available if you want to make the editor better suit your working style. If you have used the Microsoft Word word processing program, you may recognize a lot of overlap between Outlook's editor options and the options available in Word. There a good reason for this — Outlook's editor is in fact based on Word.

Summary

It seems that Outlook has an overwhelming number of email options — it can seem overwhelming to try to understand them all. Fortunately, most options can be left with their default settings and changed only when you have a specific reason to do so. As you become more familiar with Outlook, you gain a better understanding of how to set options to maximize your convenience and productivity.

Chapter 8

Dealing with Junk Email

Junk email, often called spam, is a problem for most email users. It can range from a minor annoyance for a home user to a major problem for a large organization, clogging mail servers and reducing the efficiency of employees. Fortunately, Outlook provides you with tools that greatly reduce the spam problem.

IN THIS CHAPTER

- **Understanding junk email filtering**
- **Setting junk email options**
- **Defining blocked and allowed lists**

Understanding Junk Email Filtering

Junk email filtering works on two principles. The first is the content of the message — certain keywords and phrases are considered likely to be spam. The other is the identity of the sender. You can define a safe list — people whose messages are never treated as spam regardless of content. Likewise you can define a blocked list, people whose messages are always treated as spam regardless of content. In either case, messages that Outlook flags as spam are placed in the Junk E-mail folder rather than the Inbox.

Why doesn't Outlook just delete spam messages? The fact is that content-based spam filtering is not perfect, and it's possible that legitimate messages will sometimes be caught as spam. Some people like to quickly scan their Junk E-mail folder before permanently deleting the messages just to make sure that a legitimate message has not been caught. However, if you want spam to be deleted automatically, you can tell Outlook to do this. See the next section, "Setting Junk EMail Options," for details.

Third-Party Anti-Spam Software

There are several anti-spam programs on the market that work in conjunction with Outlook to catch spam. These programs may provide more sophisticated filtering options and other features. If you are using one of these programs you may want to turn Outlook's spam filtering off. You do not have to, however — leaving it on does no harm and may in fact catch spam that the other program misses.

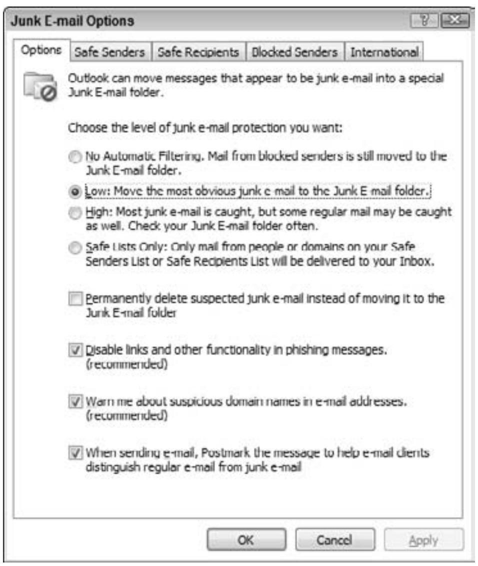
Setting Junk Email Options

Settings for Outlook's filtering and handling of junk email are made in the Junk E-mail Options dialog box, as follows:

1. Select Tools, Options from the main Outlook menu to display the Options dialog box.
2. On the Preferences tab, click the Junk E-mail button. Outlook displays the Junk E-mail dialog box.
3. If necessary, click the Options tab (shown in Figure 8.1).
4. Make option settings as described next.
5. Click OK.

FIGURE 8.1

Setting options for junk email filtering.



The first option in this dialog box determines the level of filtering based on message content. There are four levels to choose from:

- **No Automatic Filtering:** Messages are not filtered based on their content.
- **Low:** Only obvious spam is treated as such. Some spam will get through to your Inbox.
- **High:** More stringent spam rules are applied when scanning message content. Some legitimate messages may be treated as spam.
- **Safe Lists Only:** Only messages from senders on your safe lists (explained later in this chapter) are allowed through — all other messages are treated as spam regardless of their content.

The other options in this dialog box are as follows:

- **Permanently Delete...:** If this option is selected, messages that Outlook considers to be spam will be deleted rather than moved to the Junk E-mail folder. You may not want to use this option unless you are sure that legitimate messages are not mistakenly being tagged as spam.
- **Disable Links...:** Phishing messages (see sidebar) usually contain links to web pages where you will be asked for confidential information such as passwords. If this option is selected, Outlook will disable these links.
- **Warn Me About...:** A spoofed domain name is one that is not what it appears to be. For example, a link might display www.microsoft.com but actually be a link to another domain. If this option is selected, Outlook will warn you about possibly spoofed domain names in a message.
- **When Sending Email, Postmark...:** If this option is selected, all messages you send will be postmarked as an anti-spam measure. See the following section for more information on postmarking.

Understanding Postmarking

Postmarking is a new technique designed to help in the fight against spam. Postmarking a message adds to the time required to process and send it. For normal users who send dozens or even

Phishing

Phishing is a particularly dangerous kind of junk email. A phishing message pretends to be from a company you do business with, for example PayPal or eBay. The message asks you to take some seemingly legitimate action, such as resetting your password. When you follow the link to a web site, the site looks just like the real thing, but it is not — it's a fake web site set up by the phisher. The end result is that some unscrupulous person now has your password and you can imagine the possible consequences.

Spam and Viruses

Is spam related to viruses? Not directly, although viruses often arrive as part of a spam message (but can come with a legitimate message too). Virus protection in Outlook is covered in Chapter 20.

hundreds of emails a day, the extra time required is insignificant. For spammers who rely on being able to send millions of emails, however, the extra time results in an increase in costs. Therefore, a postmarked message is less likely to be spam than one that is not postmarked. Postmarks are just one of many factors that an email client can take into account when filtering spam.

Blocking and Allowing Specific Addresses

A very useful tool in the fight against spam is Outlook's capability to define lists of email addresses and domains that are always blocked or always allowed through.

Defining Safe Senders

A *safe sender* is a person, or more precisely an email address, whose email messages are always considered to be okay — not spam — regardless of the content. Sometimes a safe senders list is called a *white list*. You can create a safe senders list based on your contacts and also by entering individual addresses. You can also specify entire domains as safe — for example, all messages from `www.microsoft.com` would be considered to be safe. Here are the steps to follow:

1. Select Tools, Options from the main Outlook menu to display the Options dialog box.
2. On the Preferences tab, click the Junk E-mail button. Outlook displays the Junk E-mail dialog box.
3. If necessary, click the Safe Senders tab (shown in Figure 8.2).
4. To add an address or domain to the list, click the Add button.
5. Enter the address (for example, `someone@microsoft.com`) or the domain (for example, `microsoft.com` or `@microsoft.com`).
6. Click OK to add the address or domain to the safe list.
7. To edit or remove a safe list entry, highlight it in the list and click the Edit or Remove button.
8. Click OK.

The other two options in this dialog box are self-explanatory. It is recommended to have the Also Trust E-mail from My Contacts option selected, because this saves you the effort of entering these addresses manually.

FIGURE 8.2

Defining your safe senders list.

The Import and Export tools are useful if you want to transfer a safe list between Outlook and another email program, or pass your safe list to a friend or colleague. The import/export format is a plain text file with one address per line.

Defining Safe Recipients

The safe recipients list, located on another tab in the Junk E-mail Options dialog box, is similar to the safe senders list but it marks messages as okay based on their recipients rather than their sender. This is useful when you are on a distribution list or in another situation where you receive emails that are sent to a list of recipients including you. When an email address is on the safe recipients list, any message sent to you *and* to that address will never be treated as spam, regardless of the message sender and content. The Safe Recipients tab works exactly the same as the Safe Senders tab, described in the previous section.

Defining Blocked Senders

A blocked sender is an email address or domain whose messages are always treated as spam. The Blocked Senders tab in the Junk E-mail Options dialog box works exactly like the Safe Senders tab as described earlier.

Blocking/Allowing Individual Senders

The context menu is a fast way to add addresses to your safe and blocked lists. All you have to do is right-click the message in the Inbox (or whatever folder it is in), select Junk E-mail from the context menu, then select the desired action from the next menu. If you have opened a message, you can use the commands in the Junk E-mail section of the ribbon to perform related commands:

- **Block Sender:** Adds the message sender to your blocked senders list.
- **Safe Lists:** Choose from the menu to add the sender to your safe sender or safe recipient list or to add the sender's domain to the safe senders list.
- **Not Junk:** This command is available only if the message is in your Junk E-mail folder. Click to move the message to the Inbox and add the sender to your safe senders list.

International Junk E-mail Options

You may find that you receive some emails that appear to be gibberish, random meaningless characters. This is caused when someone sends you an email using a different character encoding than the one you are using. For example, a person in China will likely use Chinese encoding to create a message in Chinese characters. If your email reader is set to use, say, English encoding, the message will display as gibberish. Outlook lets you block messages that use specified character encodings. It also lets you block emails from certain countries based on the top-level domain of the sender's address. Here are the steps to follow:

1. Select Tools, Options from the main Outlook menu to display the Options dialog box.
2. On the Preferences tab, click the Junk E-mail button. Outlook displays the Junk E-mail dialog box.
3. If necessary, click the International tab.
4. To block top-level domains, click the Blocked Top-Level Domains button to display a list of domains (see Figure 8.3).
5. Put a checkmark next to the domains you want to block and click OK.
6. To block character encodings, click the Blocked Encodings List to display a list of encodings (see Figure 8.4).
7. Put a checkmark next to the character encodings you want to block and click OK.
8. Click OK to close the Junk E-mail Options dialog box.

FIGURE 8.3

Specifying top-level domains to block.

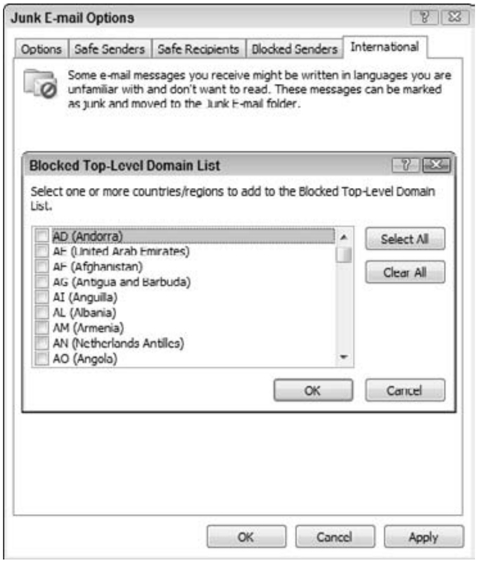


FIGURE 8.4

Specifying character encodings to block.

What's a Top-Level Domain?

The top-level domain of an email address is the part after the last period. In the United States we are used to seeing top-level domains such as .com, .org, and .edu that indicate the type or organization. In the rest of the world, however, the top-level domain usually identifies the country of origin — for example, .ca for Canada, .cn for China, and .fr for France. For the United States, .us is used although you rarely see it.

Summary

Spam, or junk email, is a serious problem for most email users. Outlook provides you with some powerful tools to detect and filter spam. By understanding these tools and using them efficiently, you can greatly reduce the negative impact spam has on your productivity.

Chapter 9

Processing Messages with Rules

Outlook lets you automate the handling of email messages with *rules*. A rule can do things such as moving messages from a specific person to a designated folder or deleting messages with certain words in the subject. Rules can also display alerts, play sounds, and move InfoPath forms and RSS feed items. Rules can help you save time and stay organized.

IN THIS CHAPTER

Understanding Email Rule Basics

Outlook email rules are all similar in that they specify a *condition* and an *action*. A rule can be defined to apply to email messages when they arrive, which is most common, and also to messages as you send them. The Rules Wizard, where you create rules, provides a set of partially defined rules for commonly needed actions—all you need to do is fill in the details. It also provides the capability to define a rule completely from scratch, a feature you'll use if one of the existing rule templates does not meet your needs.

Creating a New Rule

To create a new email rule, select Rules and Alerts from the Tools menu. Outlook displays the Rules and Alerts dialog box where you should select the E-mail Rules tab. If you have any rules already defined they will be listed here. You can work with existing rules as described later in this chapter. To create a new rule, click the New Rule button to display the Rules Wizard, as shown in Figure 9.1.

FIGURE 9.1

The first step in defining a new rule.

You can see that there are two parts to this dialog box, Select a Template at the top and Edit the Rule Description at the bottom. The following sections look at these in turn.

Selecting a Rule Template

The Select a Template portion of this dialog box is divided into three sections, each containing two or more templates:

- **Stay Organized:** Templates that move, delete, or flag messages or other items.
- **Stay Up to Date:** Templates for alerting you when messages arrive.
- **Start from a Blank Rule:** Templates that are empty and let you define a rule from scratch.

The remainder of this section deals with the first two of these categories. Starting from a blank rule is covered separately later in this chapter.

When you click an item in the Select a Template section, the Edit the Rule Description section displays the rule definition along with an example. Editing the definition is covered in the next section.

Editing a Rule Description

A rule definition contains underlined elements that represent the parts of the rule that you can edit. Figure 9.2, for example, shows a definition with two editable elements: "people or distribution list" and "specified." When you click such an underlined element, Outlook opens a dialog box where you can specify the details. In this example:

- Click "people or distribution list" to open a dialog box where you can select the people and/or distribution lists from your address book. The rule is applied to messages from the selected people.
- Click "specified" to select a folder to which matching messages will be moved.

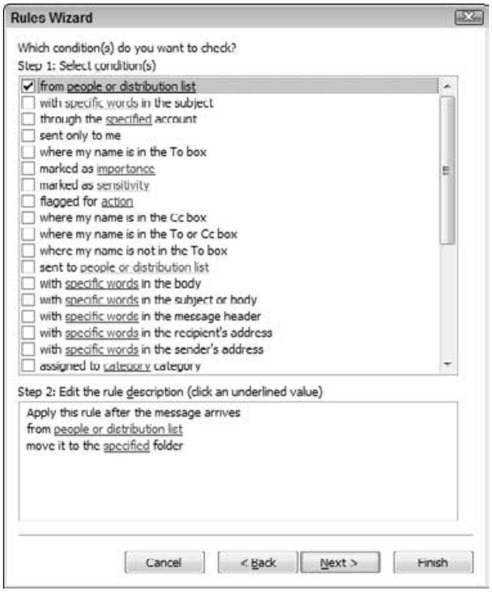
FIGURE 9.2

The elements of a rule definition that can be edited are underlined.

After you have made selections for the editable rule items, the rule displays the selected information. An example is shown in Figure 9.3 where the rule is defined to move messages from specific people to a specific folder. Note that these elements of the rule are still underlined and can be clicked to make changes to the rule as needed.

FIGURE 9.3

A completed rule definition displays the details that you have specified.



Finishing the Rule

At this point the rule is ready to use. You can click Finish in the Rules Wizard dialog box to save the rule. In some cases you may want to fine-tune the rule, in which case click the Next button. Fine-tuning a rule is essentially the same as creating a rule from a blank template, covered in the next section.

Creating a Rule from a Blank Template

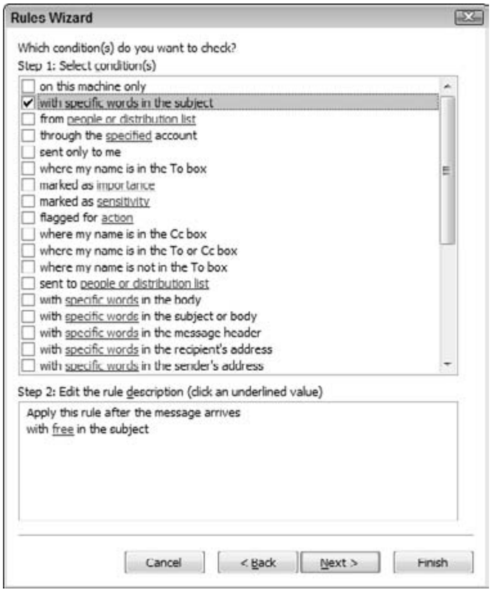
If the rule templates that Outlook provides do not suit your needs, you can create a rule from a blank template. In the first step of the Rules Wizard, shown earlier in Figure 9.1, you must select one of the following from the Start from a Blank Rule section:

- **Check Messages When They Arrive:** To create a rule that works with messages you receive.
- **Check Messages After Sending:** To create a rule that works with messages you send.

After making your selection, click the Next button. Outlook displays the next wizard step as shown in Figure 9.4. You use this dialog box to specify the conditions for the rule. You can have more than one condition for a rule. When you do, all conditions must be met for a message to be processed. The steps to follow are described next.

FIGURE 9.4

Selecting conditions for a rule.



1. Click the box next to a description to place a checkmark in the box and add the condition to the rule description.
2. If the condition requires it, click the underlined element in the description to specify the details.
3. Repeat steps 1 and 2 if needed to add additional conditions to the rule.
4. Click the Next button to proceed to the next wizard step where you will define the rule's action. This dialog box is shown in Figure 9.5.
5. Put a checkmark next to the action that you want to be part of the rule.
6. If necessary, click any underlined element in the action to specify the details.
7. Click Next to display the next wizard step where you specify any exceptions to the rule (see Figure 9.6). An exception lets you modify a rule as in this example: If the message subject contains the word "free" then delete it unless the sender is in my contacts list. Exceptions are optional, and they are added the same way as conditions and actions.

8. Click Next to go to the final step of the wizard (see Figure 9.7). In this dialog box you specify a name for the rule and have the opportunity to edit the rule by clicking underlined elements in the rule description. You can also set the following options:
   - **Run This Rule Now...:** Apply the rule to messages already in your mailbox.
   - **Turn on this Rule:** Enable the rule for newly received or sent messages.
   - **Create This Rule on All Accounts:** Apply the rule for all your email accounts (relevant only if you have multiple accounts).
9. Click Finish to complete the rule definition and return to the Rules and Alerts dialog box.

FIGURE 9.5

Selecting an action for a rule.

FIGURE 9.6

Specifying exceptions for a rule.

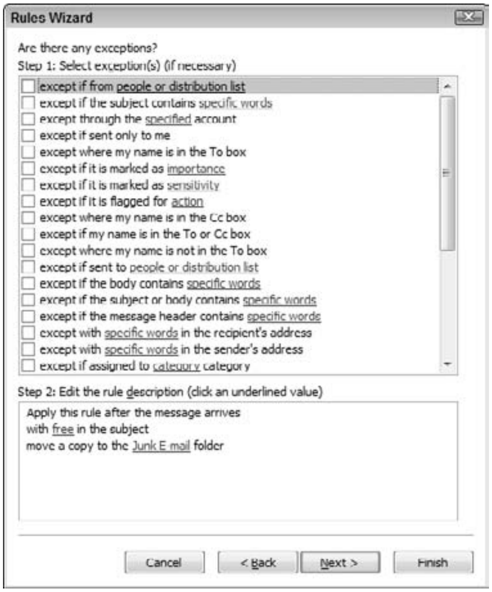
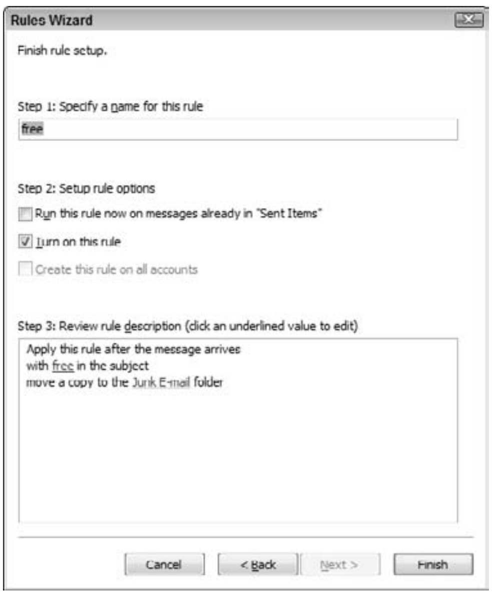


FIGURE 9.7

The final step of the Rules Wizard.



Some Rule Examples

Outlook email rules are admittedly rather complex. It may help you to understand them if you follow the steps required to define a few different kinds of rules.

Rule Example 1

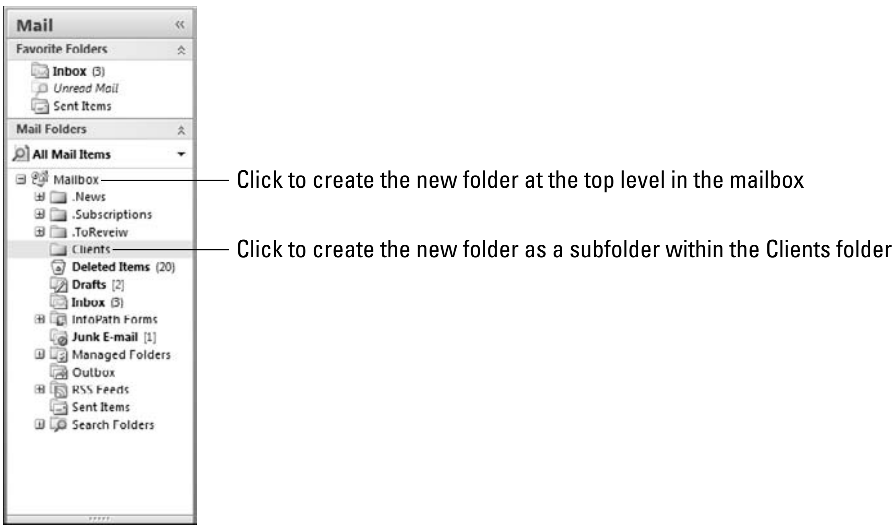
This first rule example shows you how to define a rule that moves all messages from a certain domain to a specified folder. It would be useful if, for example, you are doing some contracting work for a company and are interacting with several people there. This rule moves all email that you receive from anyone at that company into one folder, helping you to stay organized.

The first step is to create the folder:

1. In the mail navigation pane, click the location where you want to place the new folder. You can click a mailbox if you want the new folder to be at the top level in that mailbox. You can also click an existing folder to create the new folder within that folder. See Figure 9.8.

FIGURE 9.8

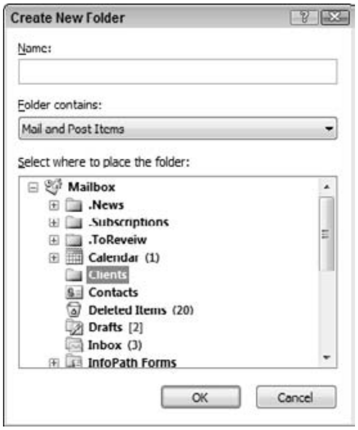
Selecting where to create a new mail folder.



2. Click the arrow next to the New button on the toolbar and select Folder from the menu. Outlook displays the Create New Folder dialog box, as shown in Figure 9.9.

FIGURE 9.9

Entering a name for the new folder.



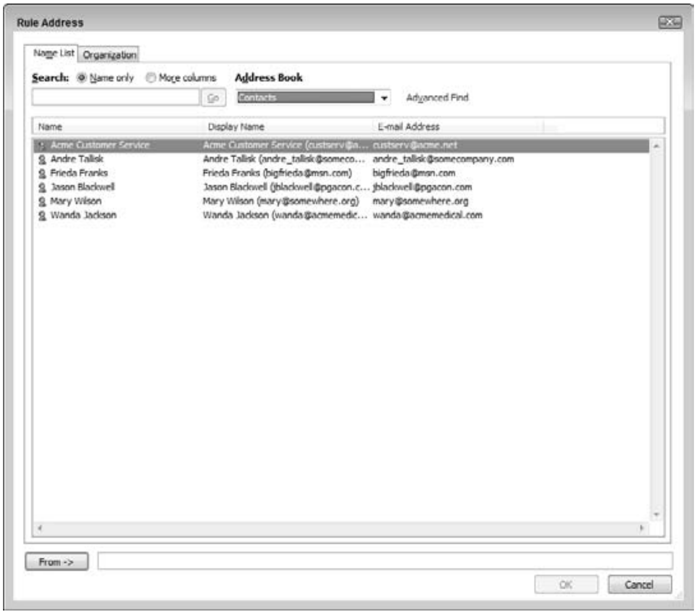
3. Enter the new folder name in the Name box.
4. Make sure that Mail and Post Items is selected in the Folder Contains list.
5. Click OK.

Now that you have created the folder you can proceed to defining the rule:

1. Select Tools, Rules and Alerts from the Outlook menu to display the Rules and Alerts dialog box.
2. On the E-mail Rules tab, click the New Rule button. Outlook displays the Rules Wizard dialog box.
3. In the Stay Organized section, click the “Move messages from someone to a folder” template.
4. In the Edit the Rule Description section, click the “people or distribution list” link. Outlook displays the Rule Address dialog box (see Figure 9.10).
5. If you wanted to move messages from a single individual who is in your contacts list, you could click that person’s entry in the list and then click the From button. Because you want to move all messages from a domain, enter “acme.com” in the From box (without the quotes, of course).
6. Click OK.
7. Outlook may display a dialog box claiming not to recognize “acme.com” because it is not a complete email address. This is okay — just click Cancel to close this dialog box and return to the Rules Wizard.

FIGURE 9.10

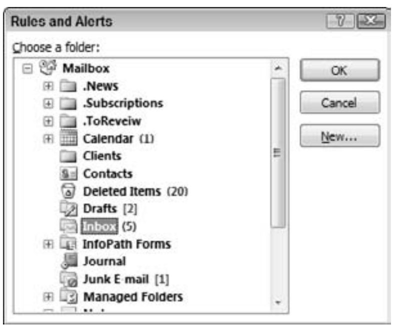
Specifying an address to be part of a new email rule.



8. In the Edit the Rule Description section, click the "specified" link. Outlook displays the dialog box shown in Figure 9.11.

FIGURE 9.11

Specifying the folder where messages are to be moved.



9. Select the desired destination folder and click OK. Note: If you had not created the new folder earlier, you could do it now by clicking the New button in this dialog box.
10. Back in the Rules Wizard dialog box, click the Finish button to close the Rules Wizard and return to the Rules and Alerts dialog box.

After you create a rule you will see it listed in the Rules and Alerts dialog box. It is assigned a default name based on the information in the rule. You can, if desired, change the rule name as explained later in this chapter in the section on managing rules.

Rule Example 2

This rule example shows you how you can use a rule to help guard against spam. Say you receive a lot of junk email offering to sell you prescription medication online. However, the subject of the message is often disguised, so you want to define a rule that looks for the word “prescription” in both the subject and the body of the message — if the word is found, delete the message.

But there’s a wrinkle — you do in fact get some meds from a legitimate online drug store, and you do not want emails from them to be caught — so the rule will have to include an exception. Here are the steps for creating this rule:

1. Select Tools, Rules and Alerts from the Outlook menu to display the Rules and Alerts dialog box.
2. On the E-mail Rules tab, click the New Rule button. Outlook displays the Rules Wizard dialog box.
3. In the Start from a Blank Rule section, click the Check Messages When They Arrive template.
4. Click Next to display a list of conditions.
5. Put a checkmark next to “with specific words in the subject or body.”
6. In the lower part of this dialog box, click the “specific words” link to open the Search Text dialog box (see Figure 9.12).

FIGURE 9.12

Specifying words that will be searched for in a message.

7. Enter the word “prescription” in the upper box and click Add to add the word to the list. If you wanted to search for more than one word you would repeat this step as needed.
8. Click OK to return to the Rules Wizard dialog box.
9. Click Next to display a list of actions.
10. Put a checkmark next to the Delete It action. This moves matching messages to the Deleted Items folder. You can also select the Permanently Delete It action, which does precisely what it says.
11. Click Next to display a list of exceptions.
12. Put a checkmark next to the “Except if from people or distribution list” exception.
13. In the lower part of the dialog box, click the “people or distribution list” link to display the Rule Address dialog box.
14. If the legitimate online pharmacy’s address is in your contacts list you can add it using the From button. Otherwise just type it in the From box and click OK.
15. Back in the Rules Wizard dialog box, click Finish to complete your rule definition.

Rule Example 3

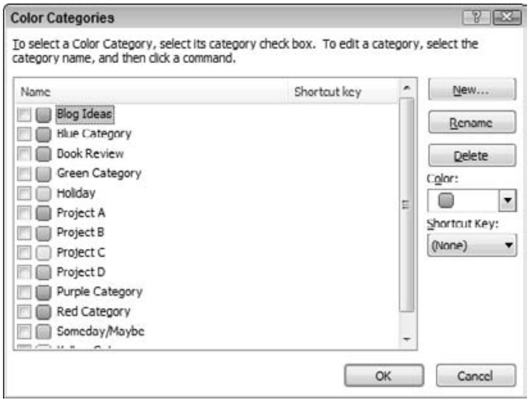
The final rule example shows you how to process messages that you send. Suppose your major client is Acme Corporation and you have created an Outlook category specifically for items related to Acme. You would like any and all messages you send to Acme to be placed in this category automatically. Here’s how:

1. Select Tools, Rules and Alerts from the Outlook menu to display the Rules and Alerts dialog box.
2. On the E-mail Rules tab, click the New Rule button. Outlook displays the Rules Wizard dialog box.
3. In the Start from a Blank Rule section, click the Check Messages after Sending template.
4. Click Next to display a list of conditions.
5. Put a checkmark next to “sent to people or distribution list.”
6. In the lower part of the dialog box, click the “people or distribution list” link to open the Rule Address dialog box.
7. Enter “acme.com” in the To box and click OK.
8. Outlook may display a dialog box claiming not to recognize “acme.com” because it is not a complete email address. This is okay — just click Cancel to close this dialog box and return to the Rules Wizard.
9. Click Next to display a list of actions.
10. Put a checkmark next to the Assign it to the Category Category option.

11. In the lower part of the dialog box, click the "category" link to open the Color Categories dialog box (see Figure 9.13).
12. Put a checkmark next to the desired category — in this case Acme — and click OK to return to the Rules Wizard dialog box.
13. Back in the Rules Wizard dialog box, click Finish to complete your rule definition.

FIGURE 9.13

Selecting a category to assign sent messages to.



Managing Rules

When you select Rules and Alerts from the Tools menu, the E-mail Rules tab in the Rules and Alerts dialog box lists all the rules defined (see Figure 9.14). If you have more than one rule, they are applied in top-down order. The actions you can take in this dialog box are

- To edit a rule, click it and then click the Change Rule button. Then select Edit Rule Settings or Rename Rule from the menu.
- To change a rule's position in the list, click it and then click the up or down arrow button.
- To copy a rule, click it and then click the Copy button. Outlook makes a copy of the rule, which you can then rename and modify as desired.
- To delete a rule, click it and then click the Delete button.
- To run rules, click the Run Rules Now button. Then, in the dialog box displayed, select the rules to run and the folder(s) and messages to apply the rules to (see Figure 9.15).
- To inactivate a rule, click the adjacent box to remove the checkmark.
- To import or export your rules from/to other versions of Outlook, or for use by a friend or colleague, click the Options button.

FIGURE 9.14

You manage your email rules in the Rules and Alerts dialog box.

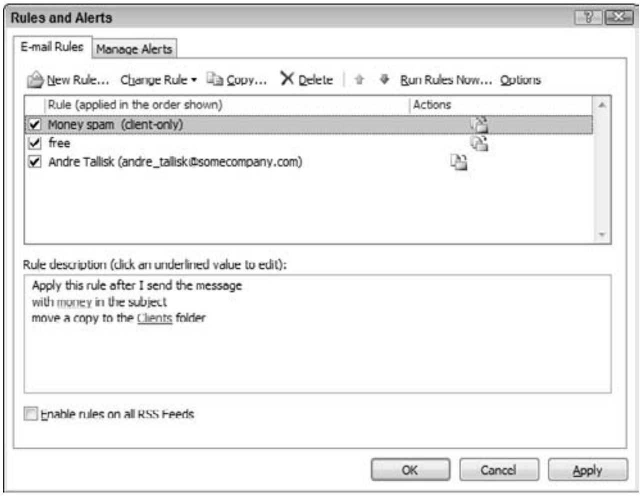


FIGURE 9.15

Running rules manually.

Summary

Email rules are another way that Outlook helps you save time and stay organized. You may be hesitant to spend the time to define a rule, but in the long run it will be well worth the effort. Of course, rules are probably not warranted for situations that arise only occasionally, but most people who rely on email in their work — and who doesn't these days — will find plenty of good uses for them.

Part III

Managing Information

IN THIS PART

Chapter 10

Managing Your Contacts

Outlook's contacts feature is much more than a simple address book. It provides you with powerful tools to not only store but to find and use information about your business and personal contacts.

IN THIS CHAPTER

Understanding Outlook Contacts

Outlook's contacts are one of its most powerful features. At heart, it is just an address book, but what an address book! Of course it covers the basics of organizing names, addresses, and phone numbers, but it can do so much more. Many people use contacts primarily as a way to store people's email addresses for ease of sending emails. This is important, but if that's all you use contacts for you are really missing out. For example, did you know that you can use Outlook contacts to do the following?

- Create electronic business cards so you can send your or other people's contact information by email.
- Store multiple phone numbers, email addresses, and postal address for an individual.
- Perform an automated mail merge, creating a mailing to some or all your contacts.
- Automatically dial a contact's phone number (if your computer is equipped with a modem).
- Store a photograph as part of a contact's information.
- Define custom fields to store whatever information you need as part of a contact.
- View a map of the location of a contact's address.

Once you understand all the power of Outlook contacts, you can use as many or as few of its features as you like.

Note that Personal Address Books, a feature available in earlier versions of Outlook, are no longer supported.

The Contacts Window

When you select Contacts in the navigation pane, the top part of the pane displays the name of your address book. Usually this is Contacts. If you have more than one address book, they will all be displayed here. Using multiple address books is covered later in this chapter — most people have and need only one.

Below the address book name is a section titled Current View (see Figure 10.1). Here you can select the way that information will be displayed in the Contacts window. There are several options, including business cards, phone list, by company, and by location. Simply click the view you want and the Contacts window changes immediately.

FIGURE 10.1

Outlook offers several different ways to view contacts.

At the bottom of the Current View section — you may need to scroll to bring these into view — are two commands: Add New Group and Customize Current View. The following sections look at these in turn.

Adding a New Contact Group

By default an address book is not subdivided. As the number of contacts grows, you may find it useful to define groups to organize contacts in a way that makes them easier to find and use. You might have Work, Personal, and Family groups, for example. To define a group, follow these steps:

1. Make sure that Contacts is selected in the navigation pane.
2. At the bottom of the Current View list, click the Add New Group link. Outlook adds a group called New Group under My Contacts (see Figure 10.2).

FIGURE 10.2

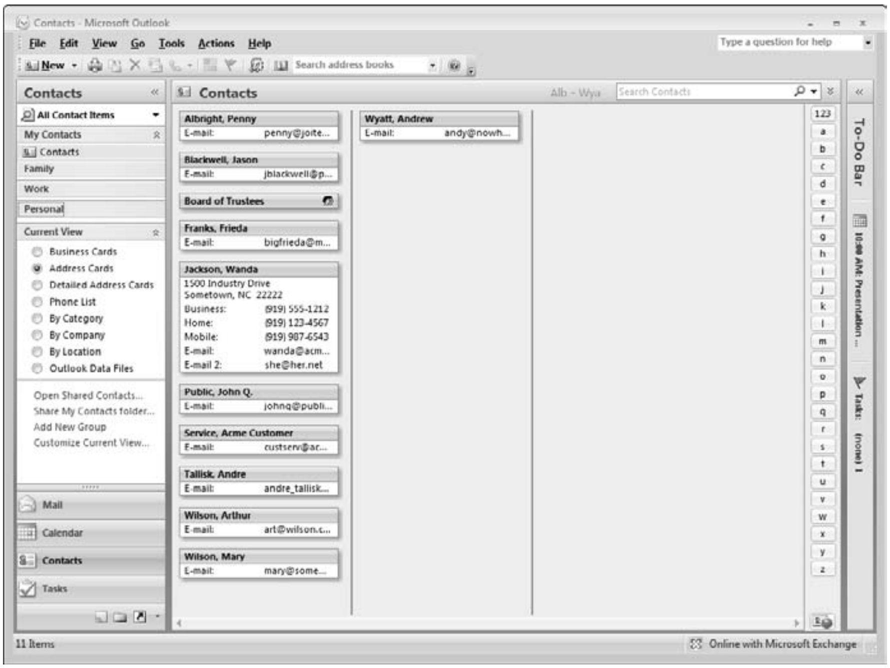
After adding a new group to your contacts.

3. Type in the group name and press Enter.
4. Repeat steps 2 and3 as needed to create more groups.

Figure 10.3 shows how the navigation pane will look after you create three new groups.

FIGURE 10.3

After creating and renaming three new groups.



After you have created one or more additional groups, you can simply drag a contact from its current group to the group that you want it in. For example, Figure 10.4 shows how you would move Wanda Jackson from the Contacts group to the Work Contacts group. If you want a given contact to be in more than one group, follow these steps:

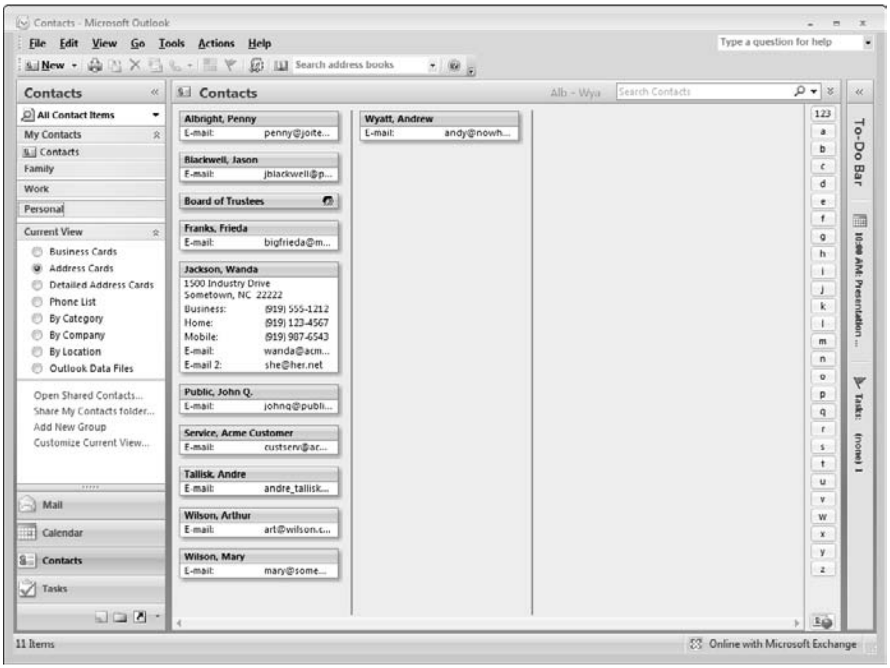
1. Select the contact.
2. Press Ctrl+C to copy the contact to the Clipboard.
3. Display the destination group.
4. Press Ctrl+V to paste the contact.

Customizing a Contacts View

The different views that Outlook provides for contacts can be customized to suit your needs. You cannot, however, create a new view from scratch. To customize a view:

FIGURE 10.4

Moving a contact from one group to another.



1. Select the view that you want to customize in the Current View list.
2. At the bottom of the Current View list, click the Customize Current View link. Outlook displays the Customize View dialog box (see Figure 10.5).
3. Click one of the buttons to change related view settings (explained in more detail in the text). The text next to each button describes the purpose of each.
4. If necessary, click Reset Current View to return the view to its original default settings.
5. Click OK to save your changes and close the dialog box.

Depending on the view you are customizing, you may have only some of the buttons in the Customize View dialog box available. This is because certain aspects of a view are not relevant to some views. The aspects of the view that you change with the different buttons are described in Table 10-1.

FIGURE 10.5

Customizing a contacts view.

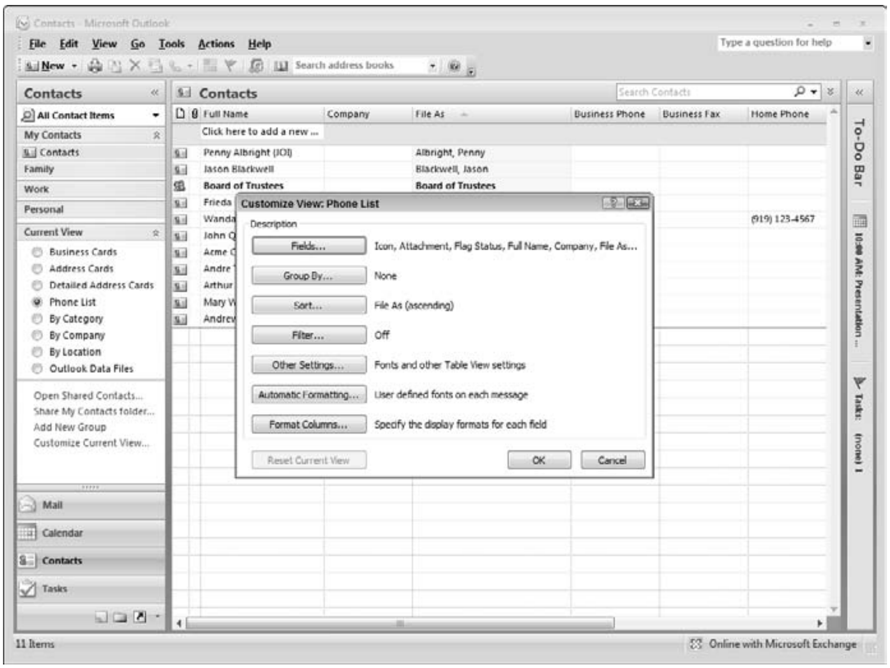


TABLE 10. 1

Components of Customizing a Contacts View

Button	Action
Fields	Specify which fields (items of information) are included in the view.
Group By	Define grouping for the displayed contacts based on one or more fields. For example, you could group contacts by company or state.
Sort	Define how contacts are sorted. You could sort by last name, for example.
Filter	Display only those contacts that meet your defined criteria.
Other Settings	Specify fonts, grid lines, and other details of contact view layout.
Automatic Formatting	Define special formatting for contacts that meet certain conditions such as an overdue task or have been flagged.
Format Columns	Define formatting for columns in the view.

Finding Contacts

As your contact list grows in size, you may find it helpful to search for contacts rather than simply look through the list hoping to find what you are looking for. At the top right of the Contacts window is a search field where you type the text you are looking for. Outlook automatically filters the contacts to show only those that match what you have entered. An example is shown in Figure 10.6. If there are no matches, a message to that effect is displayed.

After conducting a search, click the X next to the search box to clear the search and return to displaying all contacts.

The search I have just described searches all the contact fields for the text you entered. If you want to search in specific fields, you can perform an advanced search by clicking the double down arrow to the right of the search box. Outlook displays the advanced search tools as shown in Figure 10.7 (your screen may show different fields than are shown in the figure). To use these tools:

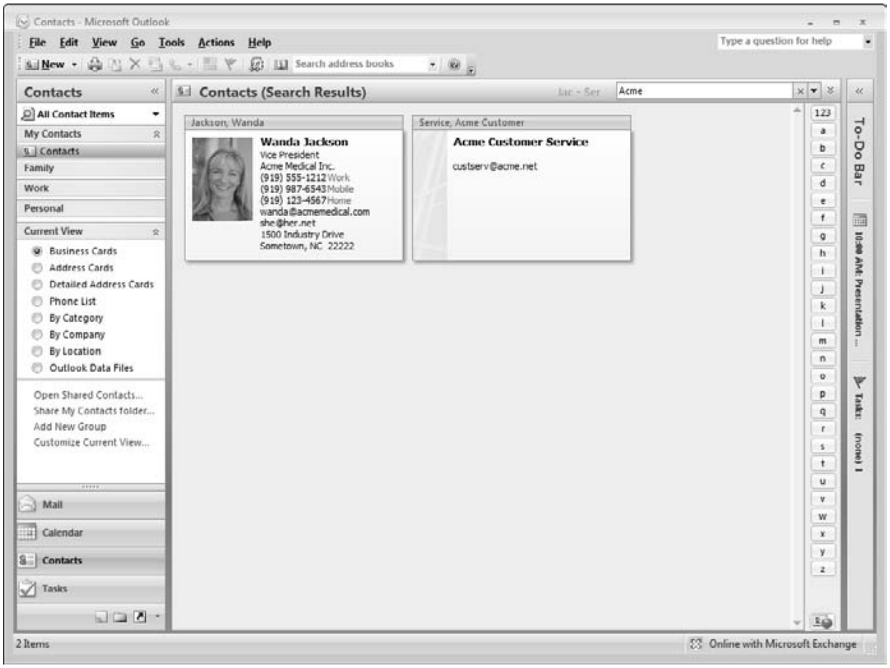
Enabling Instant Search

Instant Search is available by default in the Windows Vista operating system, but not in Windows XP. You may be prompted to download and install the search components when you start Outlook or another Office program. If you do not, and try to use Instant Search in Outlook, you will be prompted again. If you do not enable Instant Search, your search capabilities in Outlook will be limited compared to what is described here.

- Type in any of the search fields to search in that field only.
- Type in two or more search fields to display records that meet all your criteria.
- To include more fields in the search, click the Add Criteria button and then select the desired fields from the menu.
- To clear each criteria and return to display of all contacts, click the X next to the search box.
- To close the advanced search tools (while keeping the search active), click the double up arrow to the right of the search field.

FIGURE 10.6

Searching for contacts.



Searching by Category

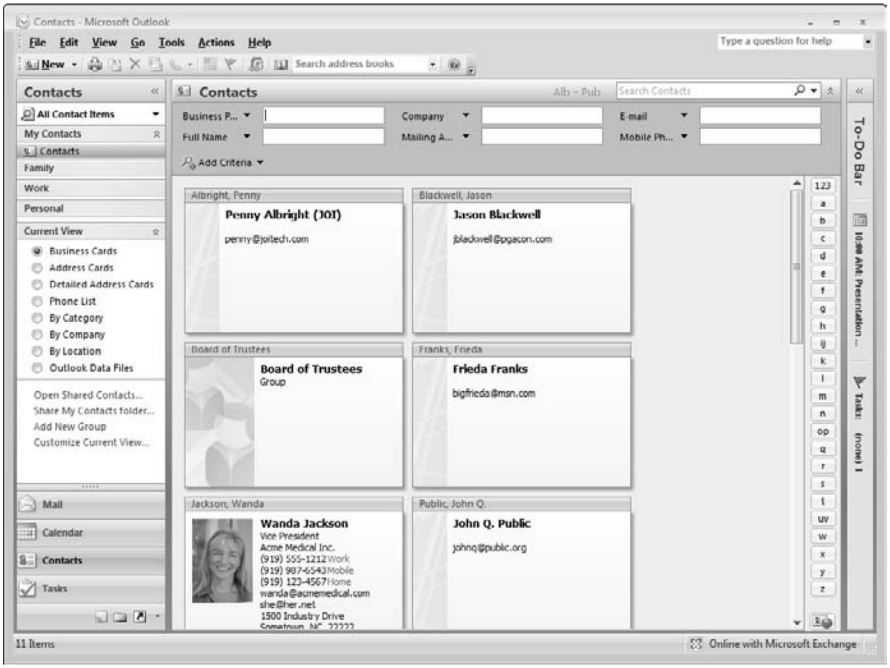
Assigning your contacts to categories, as is explained later in this chapter, can make the advanced search tool even more useful. When you add criteria to the search, one of your choices is Categories. You can use this criterion to find all contacts that fall into a certain category. This can be particularly useful when you want to perform a mail merge, as described later in this chapter.

Finding Contacts Alphabetically

In some contact views, Outlook displays a column of index buttons at the right side of the Contacts window labeled 123 then A through Z. Click one of these buttons to scroll the contact display to entries that begin with the specified letter.

FIGURE 10.7

Performing an advanced search in Contacts.



Adding Contacts to the Address Book

Outlook provides you with several ways to add information to an address book.

Adding a Contact Manually

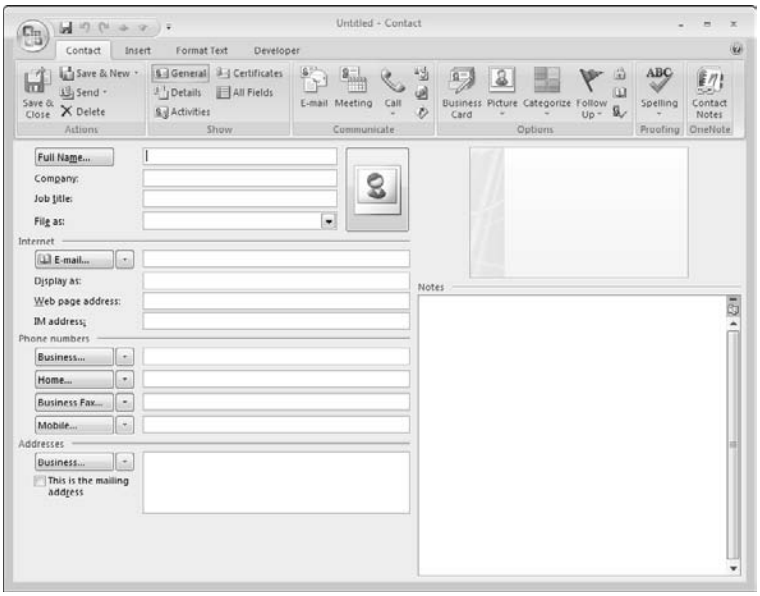
To add a new contact to the address book:

- If Contacts are active in Outlook, click the New button on the toolbar or press Ctrl+N.
- If Contacts are not active in Outlook, click the arrow next to the New button on the toolbar and select Contact from the menu.

In either case, Outlook displays a new, blank contact form as shown in Figure 10.8. Type in the information — only a name is required and you can use or not use the other fields as you desire — and then click Save and Close on the ribbon. If you want to save this contact and enter another, click Save and New. Most of the fields on the contact form are self-explanatory, but I provide full details about the form later in this chapter.

FIGURE 10.8

A blank contact form.



Adding a Contact from a Received Email

When you have opened a received email, the From field displays the name and/or the email address of the sender. It also displays any other recipients — other than you, that is — in the To and Cc fields. You can add the From person or any of the other To or Cc people to your contacts list by right-clicking the name or address and selecting Add to Outlook Contacts from the context menu. Outlook opens a new contact form with the available information filled in. This is only the person's email address and perhaps their name. You can add additional information to the contact, if desired, then click Save and Close.

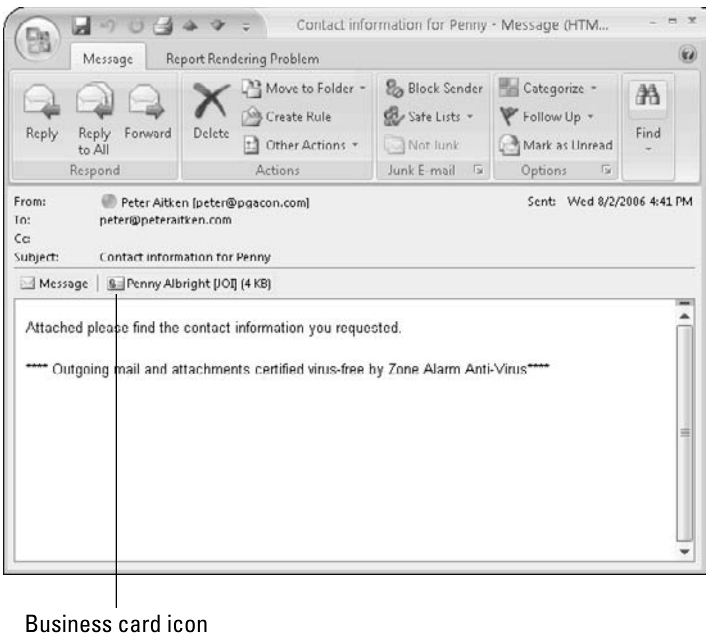
Adding a Contact from an Outlook Contact

The heading of this section may seem confusing but it makes more sense when you understand that an Outlook user can send a contact as an attachment to an email message. The technique for doing this is covered later in this chapter in the section "Sending Contact Information by Email."

If you receive a contact in an email message, it will appear as an attachment identified by a small business card icon and the contact's name, as shown in Figure 10.9. If you double-click the attachment, Outlook will open a new contact form with the contact's information entered. You can edit the information if needed and then save it to your address book.

FIGURE 10.9

When you receive an Outlook contact attached to an email message, it is identified by a small business card icon.



Adding a Contact from a vCard File

A vCard file is a special file format designed to send contact information. Although this is not Outlook's native format for sending and receiving contact information, Outlook can read vCard files that you may receive from people using other email software. They work the same way as Outlook contacts that were described in the previous section — double-click the attachment to add the information to your address book. Outlook users can also send vCards to other people — this is explained later in the chapter in the section "Sending Contact Information by Email."

Working with Distribution Lists

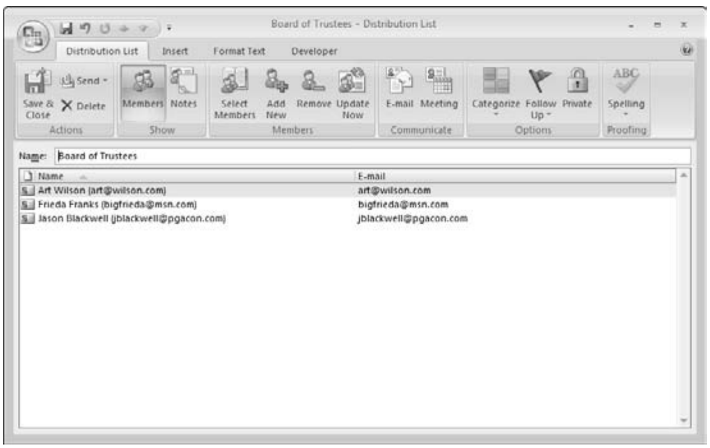
A distribution list is a collection of two or more contacts. You can easily send an email message to everyone on the list simply by selecting the list from your address book when addressing the message — there's no need to add each person individually to the message's To field.

Creating a Distribution List

To create a distribution list, click the down arrow next to the New button on the toolbar and select Distribution List from the menu. Outlook will open a distribution list form as shown in Figure 10.10. The form is initially empty, of course — this example shows some names that have been added.

FIGURE 10.10

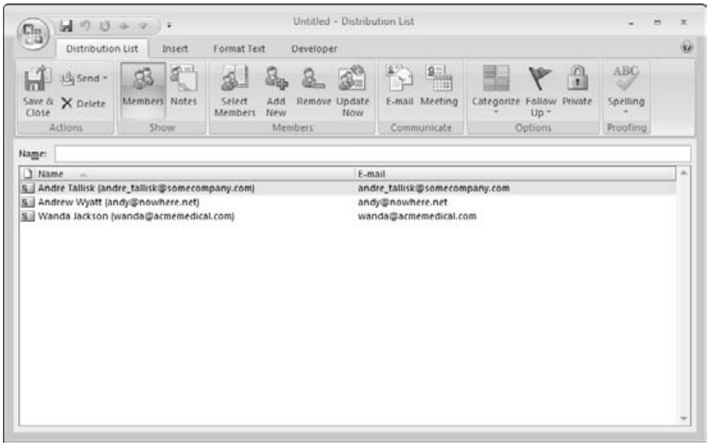
A distribution list can contain two or more contacts.



To add contacts that are already in your address book, click the Select Members button. Outlook displays the Select Members dialog box as shown in Figure 10.11. If you have more than one address book you have to select the desired one in the Address Book list. Then select individual contacts by clicking (Ctrl+Click to select more than one) and click the Members button followed by the OK button. You can also select existing distribution lists to add to the new list.

FIGURE 10.11

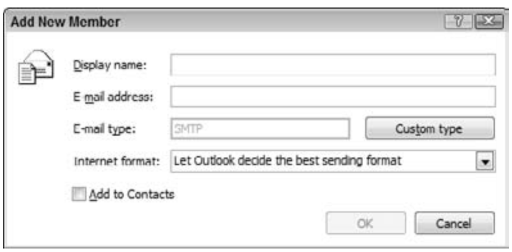
Selecting contacts from your address book to add to a distribution list.



To add a contact that is not in your address book to the list, click the Add New button. Outlook displays the Add New Member dialog box (see Figure 10.12). Enter the new contact's name and email address and select the Add to Contacts option if you want the person added as an individual entry to your contacts list as well as to this distribution list. Then, click OK.

FIGURE 10.12

Adding a contact who is not in your address book to a distribution list.



Updating a Distribution List

Suppose that one of your contacts changes her email address and you make the necessary edit in her entry in your address book. This change will *not* be reflected automatically in any distribution lists this person is part of. You must manually update the list by opening it and clicking the Update Now button on the ribbon.

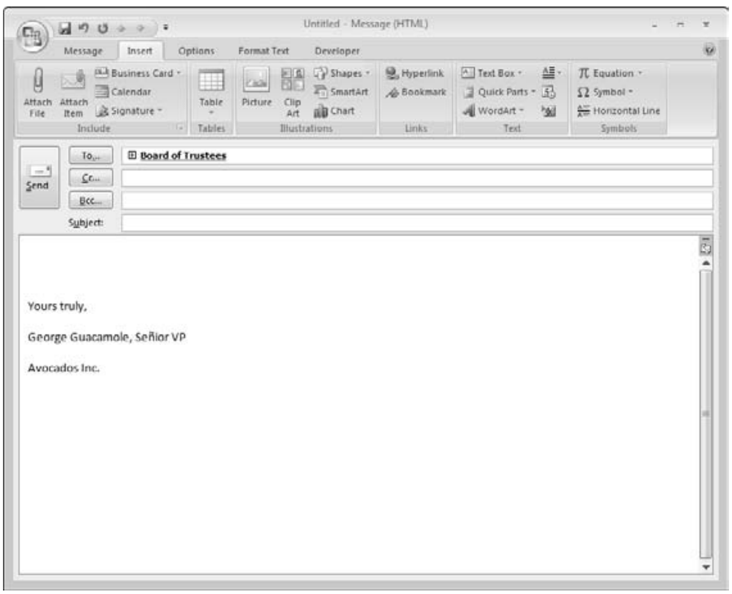
Using Distribution Lists

In many ways, a distribution list is like an individual entry in your address book. When a distribution list is open, you can use the various buttons on the ribbon (E-mail, Meeting, Categorize, and so on) just like you do for an individual contact (these are described elsewhere in this chapter). You can also send a distribution list as an attachment to an email message as described in this chapter in the section "Sending Contact Information by Email."

When you address an email message to a distribution list, the list name is displayed in the To or Cc field of the message with an adjacent + sign, as shown in Figure 10.13. If you click this + sign, the list will be expanded to its individual members just as if you had added them individually to the To or Cc field. This can be useful if you want to send a message to everyone on the list except one or two people — you can expand the distribution list and delete those few individuals from the To or Cc field of the message.

FIGURE 10.13

A distribution list in the To field of an email message.



More About Contacts

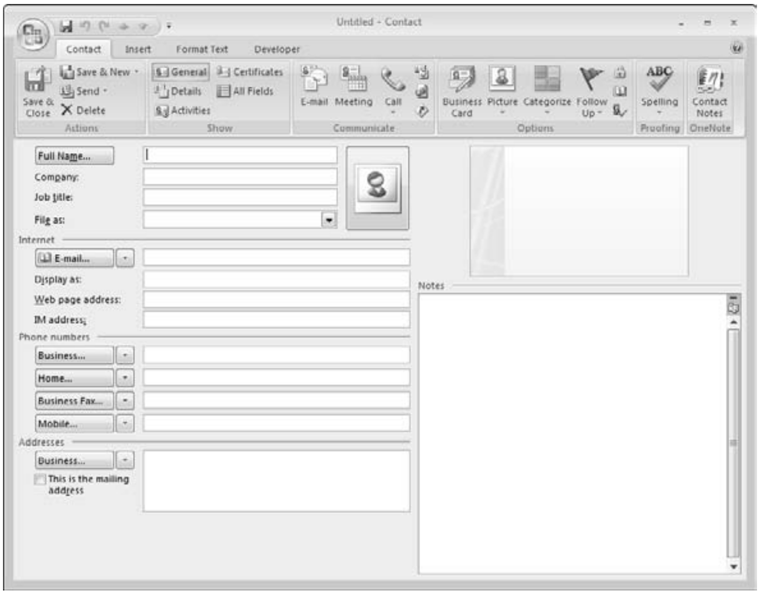
Outlook contacts are much more than a simple address book. This section covers additional details and capabilities of Outlook contacts.

The Contact Form

The contact form, shown in Figure 10.14, provides places for you to enter many different kinds of information about a contact. The only field that is required is the name — you can use all, some, or none of the other fields as required. Some of the elements on the contact form may benefit from an explanation.

FIGURE 10.14

The contact form provides fields for a wide variety of information about the contact.



Full Name

You can simply enter a contact's name in the Full Name field in the usual way, for example John Q. Public. You can also click the adjacent Full Name button to bring up the Check Full Name dialog box as shown in Figure 10.15. Here you can specify a title such as Dr. or Mrs. and a suffix such as Jr. or Sr.

Quick Email

When a contact is open, click the E-mail button on the ribbon to create a new email message addressed to the contact.

FIGURE 10.15

The Check Full Name dialog box lets you enter more details for a contact's name.

Note the option in this dialog box: Show This Again When a Name Is Incomplete or Unclear. When this option is on (the default), Outlook will open this dialog box automatically when you enter an unclear name such as "Fred" in the Full Name field.

The File As field determines how a contact will be filed in the address book. The default is last name first (Public, John Q.) but you can also choose to file a contact first name first.

Phone Numbers

The Phone Numbers section of the contact form provides spaces for four numbers. By default these are labeled as Business, Home, Business Fax, and Mobile, but you can change which numbers are displayed in a particular phone number field by clicking the adjacent down arrow and selecting from the list. Some of the choices available are Home Fax, Pager, and Assistant. Outlook will save a phone number for each designation but only four numbers will be displayed on the contact form at one time. When you open the list of designations, those for which you have entered a phone number will be checked.

Next to each phone number field is a button with the field's designation on it. If you click one of these buttons, Outlook opens the Check Phone Number dialog box as shown in Figure 10.16. Here you can enter additional details for the phone number if desired.

FIGURE 10.16

The Check Phone Number dialog box lets you enter more details for a contact's phone number.

Addresses

The Addresses section of the contact form can store up to three addresses designated as Home, Business, and Other. Select the one to display by clicking the down arrow adjacent to the address box. Click the adjacent button to open the Check Address dialog box (see Figure 10.17) where you can enter or edit address details. By default, Outlook will display this dialog box automatically if you enter an address that appears to be incomplete or unclear.

FIGURE 10.17

The Check Address dialog box lets you enter more details for a contact's address.

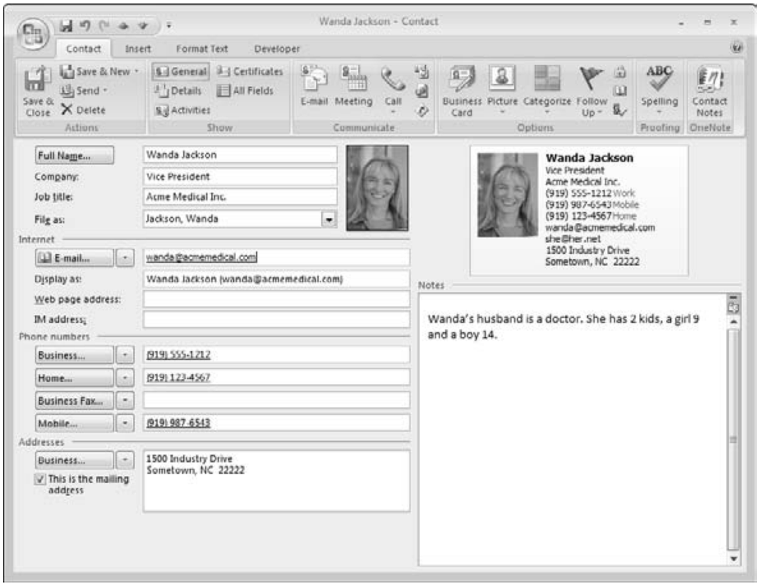
One of the addresses for a contact can be designated as the mailing address by selecting the corresponding option. Outlook uses this address when you are doing a mail merge using Outlook contact data. Mail Merge is discussed later in this chapter.

Picture

You can associate a picture with a contact by clicking the Picture button on the contact form. Outlook displays a dialog box that lets you browse for the picture file. When you have associated a picture with a contact, it displays on the picture button and also on the contact's business card, as shown in Figure 10.18. To remove or change the picture, right-click it and choose from the context menu.

FIGURE 10.18

You can associate a picture with a contact.



Email Addresses

Outlook can store as many as three email addresses for a contact, designated as E-Mail, E-Mail 2, and E-Mail 3. You select which one to display on the contact form using the arrow adjacent to the E-mail field.

If you create an email message to a contact by clicking the E-mail button on the ribbon on a contact form, Outlook will create a message addressed to all the email addresses for that contact. If you click the To button on an email message, the list of contacts will display each email separately and you can choose the one to use.

The Display As field determines how the contact is displayed in a message's To or Cc field. By default Outlook displays the contact's name followed by the email address in parentheses, but you can edit this to display as desired — for example, just the person's name.

Notes

The Notes section on a contact form is for entry of any arbitrary information that you want to save with the contact. Simply click in the box and enter/edit as usual. You can use the tools on the Format text ribbon to apply formatting to the notes text, if desired.

Other Contact Displays

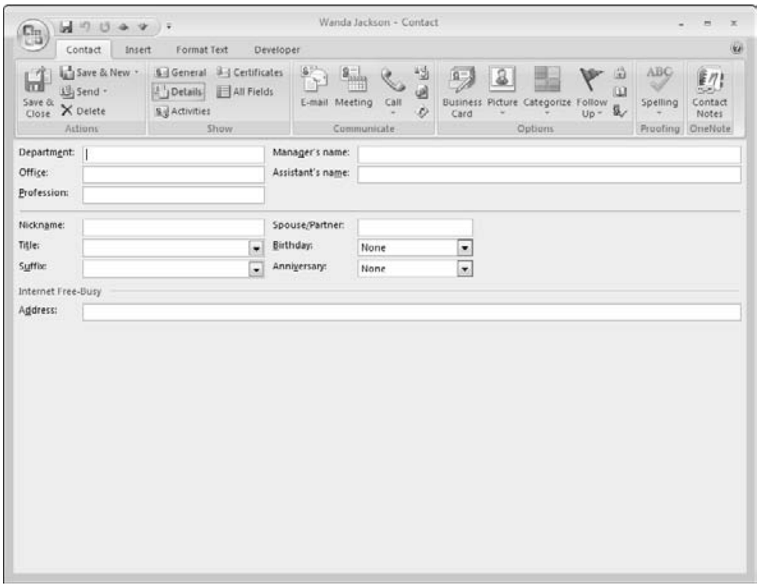
The default contact display, called General, has been shown in the figures throughout this chapter so far. This is the display that you will probably use most often. There are several other displays, or views, available — you select the display to view from the Show section of the Contact ribbon.

Details

The Details view gives you access to secondary information about a contact. This display is shown in Figure 10.19. This information includes fields such as Department, Office, Nickname, Spouse/Partner, as well as details for the person's NetMeeting settings. You may never use this view but it's available if you need it.

FIGURE 10.19

The Details view for a contact.



Certificates

One of the security features available in Outlook is digital certificates. A contact can send you a certificate. You can then use this certificate to send encrypted mail to that person. The Certificates display lets you view and work with the certificate(s) that you have for a contact. Digital certificates are covered in detail in the chapter on security (Chapter 20).

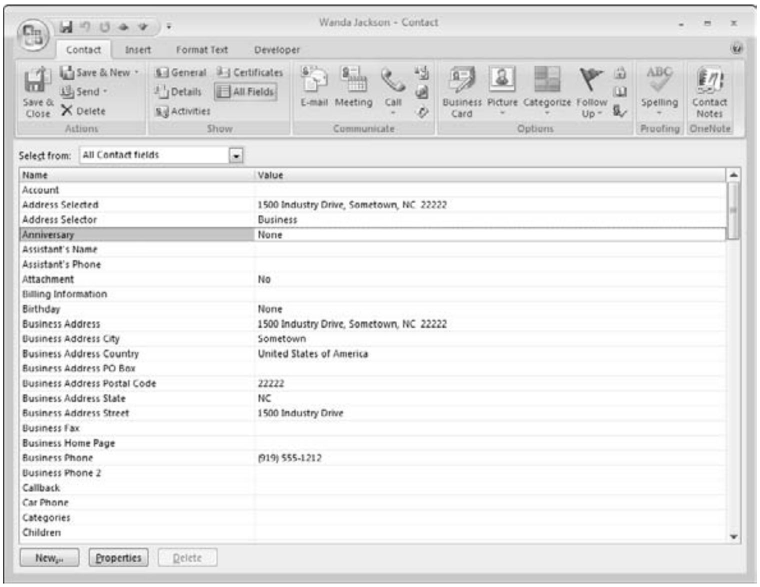
All Fields

The All Fields display lets you view all or selected subsets of the data associated with a contact. The amount of information — number of fields — that an individual contact can hold is quite impressive, way too much to display fully in any other contact view. The All Fields display also lets you define your own custom fields for a contact and to change the properties of some fields.

The All Fields display is shown in Figure 10.20. Near the top is the Select From list where you choose which fields to display in the window. You can display all fields and can also display one of several defined subsets such as All Contact Fields or All Mail Fields.

FIGURE 10.20

The All Fields view for a contact.

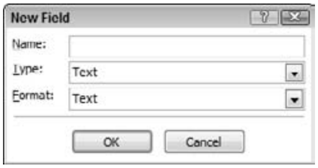


Some fields can be edited in this view by clicking in the Value column and making the desired changes. Other fields are generated internally by Outlook and cannot be edited.

You can add a custom field to the contact by clicking the New button at the bottom of the window. Outlook displays the New Field dialog box (see Figure 10.21) where you enter a name for the field (which cannot duplicate an existing field name). You also select the data type for the field. Your choices are Text, Number, Percent, Currency, Yes/No, and Date/Time. For certain data types you can also select a format from the Format list. When you are finished, click OK and the custom field will be added to the All Fields display.

FIGURE 10.21

Defining a new field for a contact.



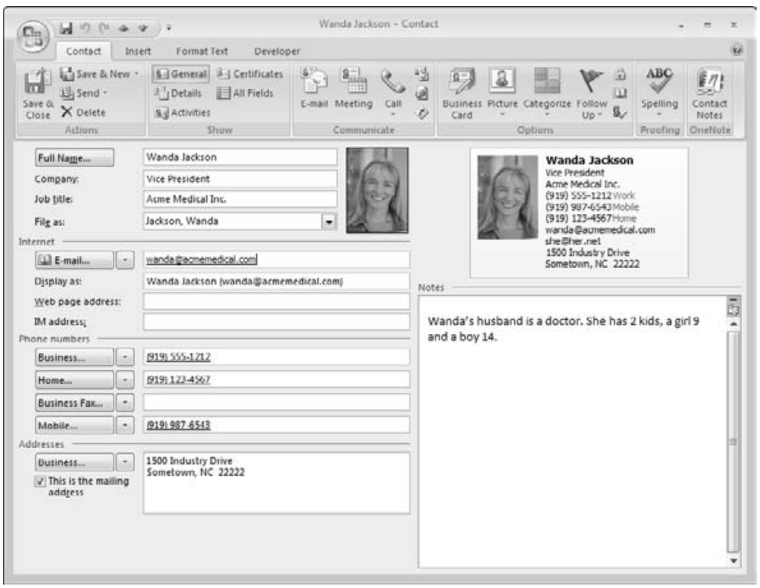
You can change the properties of a field by clicking it in the list and then clicking the Properties button. This is relevant only for user-defined fields — the properties of Outlook's built-in fields are locked.

Editing the Business Card

Outlook creates a business card for each contact based on a default template. As you can see in Figure 10.22, this template includes name, company, title, phone numbers, email and postal addresses, and a photo (assuming these elements are part of the contact).

FIGURE 10.22

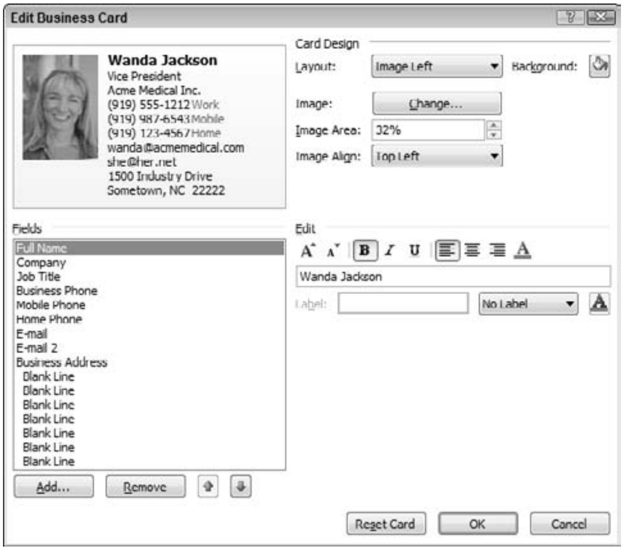
The default business card template includes the most often needed information.



To edit the business card for a contact, click the Business Card button on the Contact ribbon. Outlook opens the Edit Business Card dialog box, shown in Figure 10.23.

FIGURE 10.23

Editing the business card for an individual contact.



The top-left section of this dialog previews how the business card will look with your edits. The top-right section defines the overall layout of the card:

- **Layout:** Specifies the image location. You can also omit the image or use it as the card background.
- **Background:** Lets you select a background color for the card.
- **Image:** Click the Change button to specify a different image.
- **Image Area:** Determines how much of the card is occupied by the image. The maximum is 50%.
- **Image Align:** Determines how the image is positioned within the image area.

The lower-left section of the Edit Business Card dialog box lets you specify the data fields that are included on the card and their order. You can:

- Click Add, then select from the menu to add a field to the card.
- Click Remove to remove the selected field from the card.
- Click the up or down arrow to change the position of the selected field.

The lower-right section of this dialog box is for text formatting. When a field is selected in the Fields list, use the tools here to:

- Increase or decrease font size.
- Make font bold, italic, or underlined.
- Align text left, center, or right.
- Change font color.

Oddly enough, you cannot change the font used on a business card, just its size.

The Label section lets you add a label to any data field. You can specify the text of the label, its color, and whether it is displayed to the left or right of the item.

Click the Reset Card button to undo any edits you have made and return the card to the default appearance. Click OK to save your changes and close the dialog box.

Dialing the Phone

If your computer is equipped with a modem, you can have Outlook dial the phone for you based on the number associated with a contact. Then you can pick up your handset and complete the call as usual. This requires that the modem and handset be on the same line, which can be inconvenient if you use the modem to access the Internet. If your Internet connection is via cable modem or DSL, or via a second telephone line, you may want to use an old modem as a dedicated dialer on your voice line. The speed of the modem is not relevant in this application.

When a contact is open, click the arrow on the Call button to display the menu shown in Figure 10.24. This menu lists all the phone numbers for the current contact. Select the one to dial and Outlook opens the New Call dialog box (see Figure 10.25) with the selected phone number entered. The settings and commands in this dialog box are

- **Dialing Properties:** Opens the dialing properties where you define rules for dialing from your computer. You should not have to change these because they are set up when you install and configure your modem.
- **Create New Journal Entry...:** Creates an Outlook journal entry for the call, noting the number called and the time and date of the call.
- **Dialing Options:** Lets you set speed dialer options and add names and numbers to the speed-dial list.
- **Start Call:** Dial the number.
- **End Call:** Hang up.

FIGURE 10.24

Using Outlook to dial the phone.

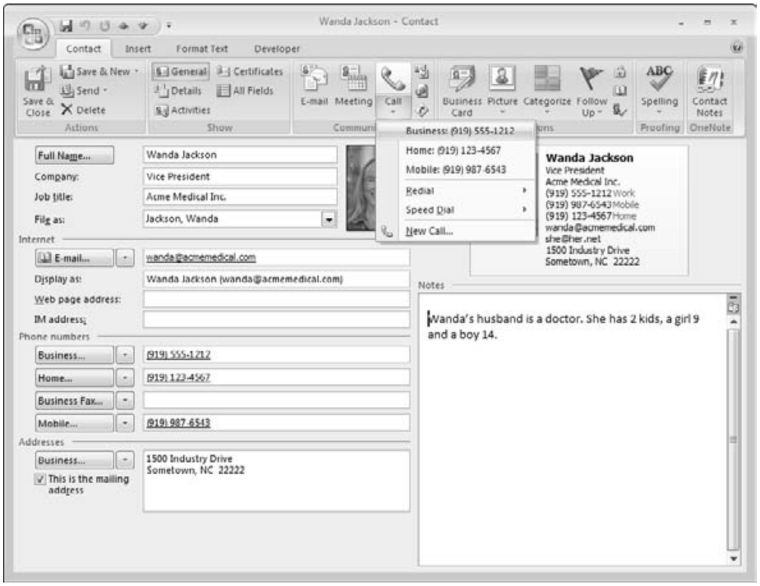
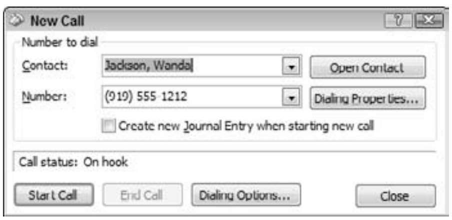


FIGURE 10.25

The New Call dialog box.



The Call menu has several other commands:

- **Redial:** Dial a recently called number.
- **Speed Dial:** Dial a number on your speed-dial list.
- **New Call:** Opens the New Call dialog box without any phone number entered.

Outlook can also make Instant Messenger calls. If you have specified an Instant Messenger address for the contact, this option will appear on the Call menu.

Sending Contact Information by Email

It can be very useful to send contact information attached to an email message. This lets recipients enter the information in their address book quickly and without errors. If you keep an entry for yourself in your address book, you can easily send your own information as well.

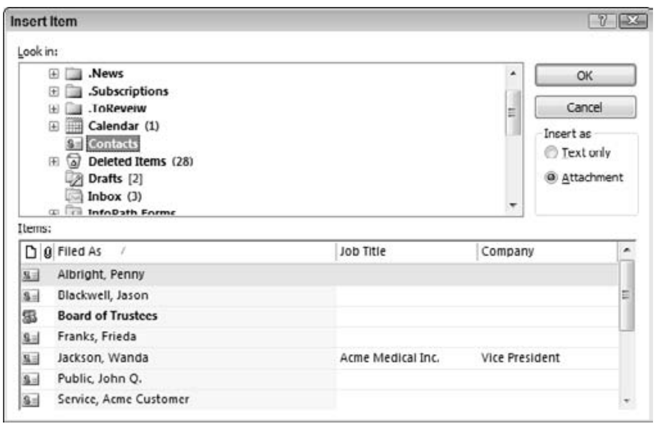
Sending Contact Information in Outlook Format

Outlook offers two formats for sending contact information. Outlook's native format is to send the information as an Outlook item. You can send individual contacts and distribution lists this way. Information sent this way can be used by other Outlook users and possibly by users of other email programs that support this format. To send contact information as an Outlook item:

1. Create and address the email message as usual.
2. On the Insert ribbon, click the Insert Item button. Outlook displays the Insert Item dialog box (see Figure 10.26).
3. In the Look In list at the top of the dialog box, click the Contacts folder.
4. In the Items list at the bottom of the dialog box, click the contact or distribution list to send. Hold down the Ctrl key while clicking to select more than one contact.
5. Make sure the Attachment option is selected. If you select the Text Only option, the information will be added to the body of the message but the recipient will not be able to automatically add it to their address book.
6. Click OK. The item, with a small business card icon, will be added to the message's attachment list.

FIGURE 10.26

Inserting an item into an email message.



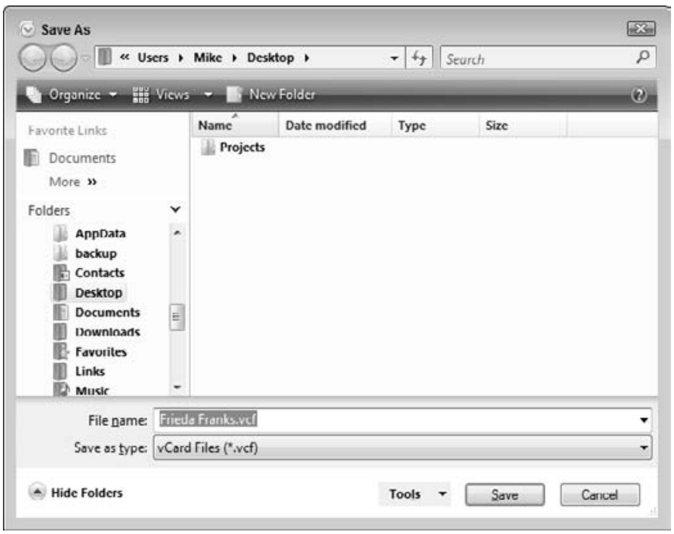
Sending Contact Information in vCard Format

The second format for sending contact information is vCard, a widely supported format for contact information. Most email programs support this format and you may want to use it when you are not sure that all the intended recipients use an email program that supports Outlook items. You can send only individual contacts using a vCard, not distribution lists. To send a vCard:

1. Open the contact that you want to send.
2. In the Contact window, click the File button and select Save As from the File menu. Outlook displays the Save As dialog box (see Figure 10.27).
3. Use the dialog box tools to navigate to the location where you want to save the vCard file.
4. In the Save as Type list, select vCard Files (*.vcf).
5. The default name for the file is the contact name. You can edit this if desired.
6. Click Save.
7. Create an email message and attach the vCard file that you just saved.

FIGURE 10.27

Saving a contact as a vCard file.



Sending Contact Information from the Contact Form

When you have a contact open, the Actions section of the ribbon includes a Send button. You can use this button to send the open contact in one of three ways by selecting the desired command from the associated menu:

- **Send as Business Card:** Outlook creates a new message with the contact inserted in the message body as a business card and attached to the message as a vCard file.
- **In Internet Format (vCard):** Outlook creates a new message with the contact attached to the message as a vCard file.
- **In Outlook Format:** Outlook creates a new message with the contact attached to the message as an Outlook item.

Other Contact Actions

This section describes some of the other actions you can perform with contacts.

Viewing a Map of the Contact's Address

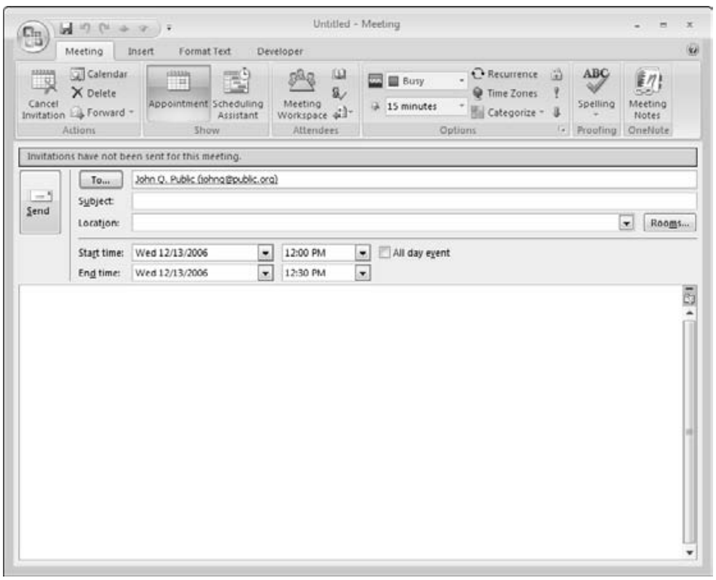
If a contact has a valid address entered, you can click the Map button on the Contact ribbon to open a web browser and view a map of the specified location. This feature is powered by the Windows Live Local web site, which provides other services such as driving directions and business search.

Inviting the Contact to a Meeting

To invite the contact to a meeting, click the Meeting button on the Contact ribbon. Outlook creates a new meeting request addressed to the contact, as shown in Figure 10.28. You can specify the subject and location, enter the date, start and end times, and include a message. You can also add other recipients to the request. You learn all about meeting requests in Chapter 12.

FIGURE 10.28

Sending a meeting request to a contact.



Use the Context Menus

Many of the actions that you can take with contacts that are described in this section can be accessed without opening the contact. In the Contacts window, simply right-click the contact and select from the context menu. You can use this technique to send a contact, call a contact, or assign a follow-up of category to a contact.

Assigning a Task to a Contact

To assign a new task to a contact, click the Assign Task button on the Contact ribbon. Outlook opens a task window, as shown in Figure 10.29, where you can enter details of the task and save it. You learn more about tasks, including assigning an existing task to a contact, in Chapter 15.

Viewing the Contact's Web Page

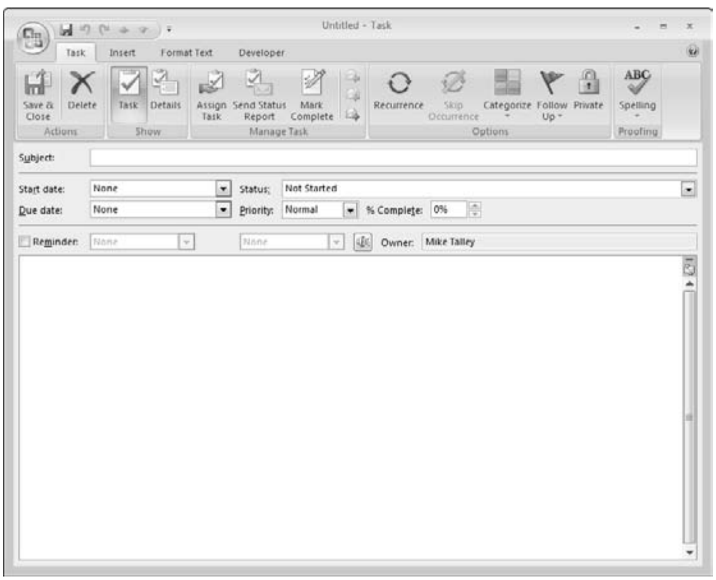
If you have entered a web page URL for a contact, clicking the Web Page button on the Contact ribbon launches your default web browser and displays the web page.

Tagging a Contact for Follow Up

To tag a contact for follow up, click the Follow Up button in the Options section of the Contact ribbon and select the desired follow-up interval from the menu.

FIGURE 10.29

Assigning a task to a contact.



Performing a Mail Merge from Your Contacts

Mail merge is a technique that lets a form letter be addressed and sent to many different individuals. It can also be used to create mailing labels, envelopes, and catalogs such as a mailing list. Microsoft Office has merge tools built in to several of its applications, most notably Word, and Outlook is included in this list.

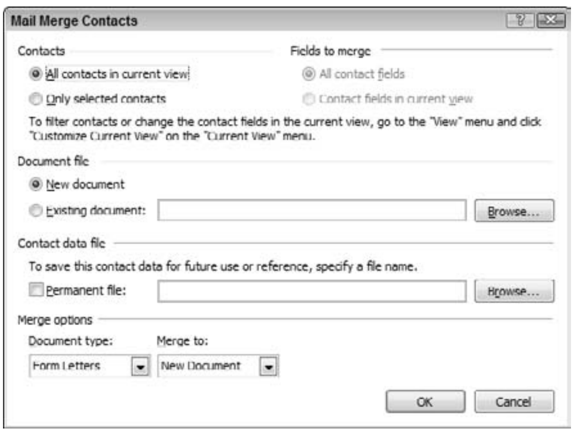
When would you use Outlook to perform a mail merge? Only when the names and addresses that you want to use are in your Outlook address book. In this situation, using Outlook is often the simplest approach. Even so, there are some factors that may mitigate against using Outlook for a merge and instead using the more advanced mail merge tools available in other Office applications. For example, Outlook cannot separate documents by ZIP code to get reduced mailing rates, and it would not be a good choice for a large merge that will create thousands of documents. You need to have Microsoft Word installed on your system to perform a mail merge.

The first step in performing a mail merge is usually to filter your contacts so that only the ones you want included are shown. You can do this by using Outlook's search capability or by customizing the Contacts view, both of which were covered earlier in this chapter. However, you can skip this step and select the contacts to include later. Then:

1. Make sure Contacts are active.
2. Select Mail Merge from the Tools menu. Outlook displays the Mail Merge dialog box as shown in Figure 10.30.

FIGURE 10.30

Performing a mail merge with Outlook contacts.



3. Make entries in this dialog box as described in the following list.
4. Click OK to open Word to complete the merge.

The options in the Mail Merge dialog box are as follows:

- **Contacts:** Select All Contacts in Current View to include all displayed contacts in the merge. Select Only Selected Contacts to select contacts to include later.
- **Fields to Merge:** Specifies whether only visible contact fields or all contact fields will be available for the merge. These options may or may not be available depending on the current Contacts view.
- **Document File:** Specifies whether the merge will use a new or an existing Word document. If you choose the latter option, use the Browse button to locate the document to use.
- **Contact Data File:** You can select this option to save the merge contact data in a separate Word document. Typically this option is used to create a record of the people who were included in the mailing.
- **Document Type:** You can merge to form letters, mailing labels, envelopes, or a catalog.
- **Merge To:** Specify whether the merge output goes to a Word document, to the printer, or to email:
  - **New Document:** Merge creates a Word document that you can edit as needed before creating the final output.
  - **Printer:** The merged document is created and sent directly to the default printer.
  - **E-mail:** The merged documents are created as email messages and placed in your Outbox.

In most situations the remainder of the merge process is carried out in Word. Please consult your Word documentation for information on how to do this.

Working with Multiple Address Books

The majority of Outlook users will have only a single address book. This is all that most people need, in fact. In some situations you may have two or more address books. This can happen if you create more than one Outlook data file. Each data file will have its own address book, and you will have access to the one in whichever Outlook data file is open. You might want to use more than one Outlook data file if you want to keep your personal email completely separate from your work email. You learn more about working with Outlook data files in Chapter 18.

Another situation where you will have more than one address book is if you have both a regular (that is, SMTP/POP) email account and a Microsoft Exchange account set up in Outlook. The regular account will have its own address book and the Exchange account will have another, separate one. You will have both available to you at the same time in Outlook — they will be listed at the

top of the navigation pane when Contacts are active, and you can choose to view one or the other. When you add a contact it will be added to whichever address book is active. Exchange address books have some additional capabilities such as sharing — this is covered in Chapter 28.

Setting Contact Options

Outlook has some global options that affect the way contacts work. To view and change these options:

1. Select Options from the Tools menu to display the Options dialog box.
2. If necessary, click the Preferences tab.
3. Click the Contact Options button to display the Contact Options dialog box (see Figure 10.31).
4. Set options as described in the following list.
5. Click OK twice to exit all dialog boxes.

FIGURE 10.31

Setting global options for contacts.

The options that are available for contacts are described here:

- **Default "Full Name" Order:** Specifies how contacts are sorted when you order them based on full name. You can choose First Middle Last, Last First, or First Last1 Last2.
- **Default "File As" Order:** Specifies how contacts are sorted when you order them based on the File As field. Your choices are Last First, First Last, Company, Last First (Company), Company (Last, First).

- **Check for Duplicate Contacts:** If this option is selected, Outlook will warn you if you try to enter a new contact with the same name as an existing contact.
- **Show Contact Linking on All Forms:** Controls whether all information linked to a contact (tasks, for example) is displayed.
- **Show an Additional Contacts Index:** If this option is selected, Outlook will display a second set of index buttons at the right edge of the Contacts window using the language you select from the list.

Summary

Outlook contacts is a powerful tool for managing and using information about people. It goes way beyond the basic address book to store just about any kind of information about a person you can imagine. What's more, it makes it easy to find and use that information in various ways. Many people find contacts to be one of Outlook's most useful tools.

Chapter 11

Working with the Calendar

IN THIS CHAPTER

A calendar is something you hang on the wall, right? It has a page for each month and a picture of a puppy, lighthouse, or famous painting. If that's what you think, then you haven't used the Outlook Calendar! Outlook provides a sophisticated calendar that helps you manage your time efficiently. It can even do things such as remind you of an upcoming appointment, help you set up meetings, and let you share your calendar with others.

This chapter covers the Outlook Calendar itself. Some other Outlook tools related to the Calendar are covered in other chapters: scheduling and meetings in Chapter 12 and tasks in Chapter 15.

Understanding the Outlook Calendar

At its heart, the Outlook Calendar stores and displays appointments. An *appointment* is just what it sounds like — a scheduled event with a title and a time/date specified for the beginning and end of the appointment. Outlook distinguishes between two types of appointments:

- A regular appointment has a specific start time and stop time. They are usually on the same day but do not have to be.
- An all-day event does not have specific start and stop times but rather takes up all of one or more days.

Scheduling appointments may not sound so special, and in fact it's not. But it's the way that Outlook lets you organize, use, and share your appointments that makes the Calendar so useful.

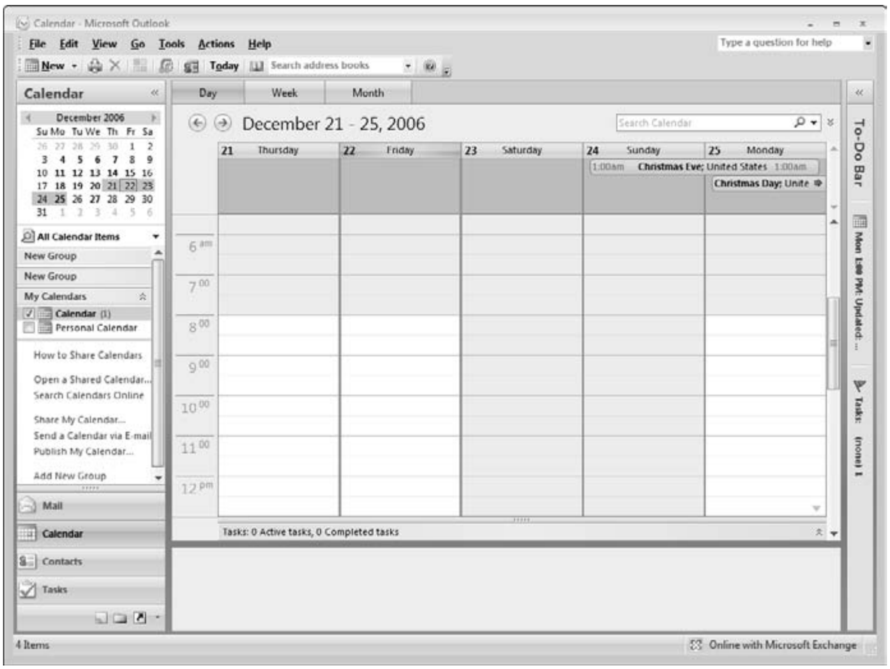
Using the Calendar

To show the Calendar, click the Calendar button in the navigation pane. The view window shows the Calendar itself, and you'll get to that in a moment. The top section of the navigation pane shows a small calendar of the current month, called the *Date Navigator*, which has several useful features, as shown in Figure 11.1.

- Today's date is enclosed in a box — the 22nd in the figure.
- The days displayed in the larger Calendar view are highlighted in the small calendar. In the figure, this is the 21st through the 25th.
- Days on which there is at least one appointment are in bold.
- The arrows to the left and right of the month and year can be clicked to move to the previous or next month, updating the Calendar view as well.
- Click any day number to change the Calendar view accordingly.

FIGURE 11.1

In Calendar view, the navigation pane displays the Date Navigator.



No Date Navigator?

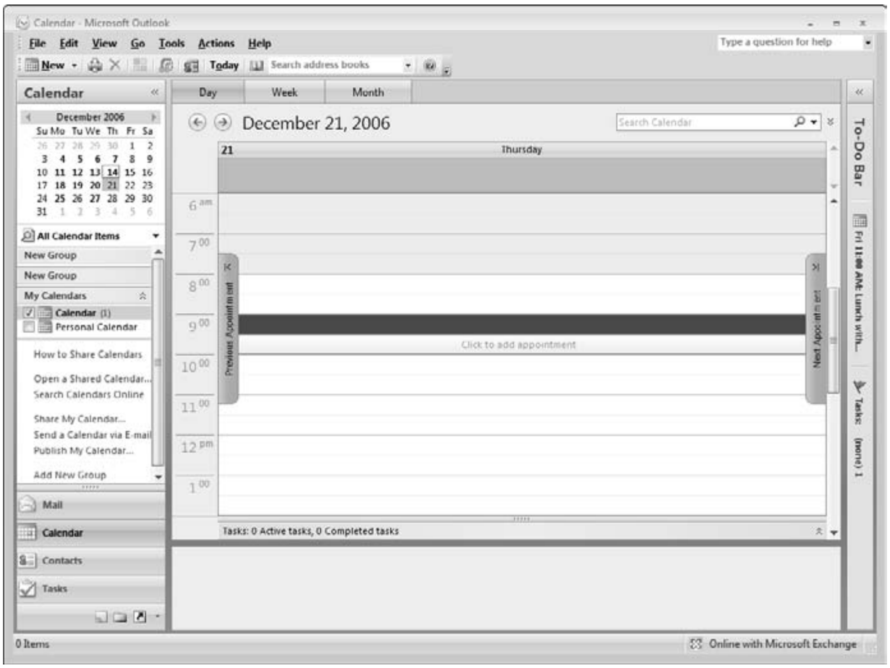
If the Date Navigator is not displayed in the navigation pane, it is probably because it is displayed in the To-Do Bar. The Date Navigator is displayed in one place or the other, not both. You learn about the To-Do Bar later in this chapter.

Working with Calendar Views

When the Calendar is displayed, you can choose between viewing a single day, a week, or an entire month. In Week view, you can also choose to view the entire week or just the work week (Monday–Friday), and in Month view you can set the level of detail display to low, medium, or high. You select your view using the buttons at the top of the Calendar. In this area, Outlook also displays the date or date range displayed as well as buttons that move the calendar forward or back by one of whatever unit (day, week, or month) is displayed. This is shown in Figure 11.2.

FIGURE 11.2

The Outlook Calendar can display a day, a week, or a month at a time.



Finding Today

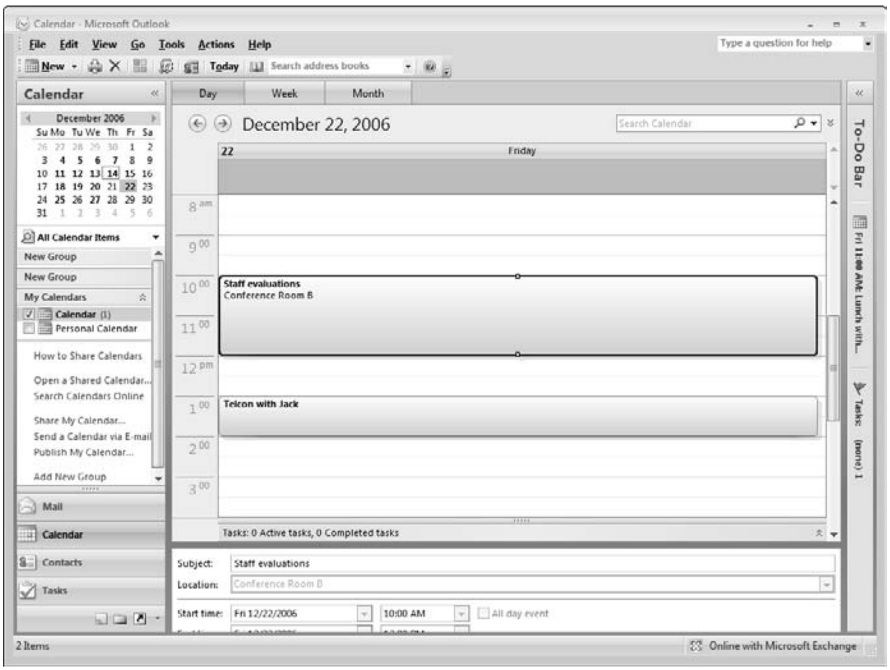
No matter what day, week, or month you are viewing in the Calendar, you can always go directly to the current day by clicking the Today button on the toolbar.

Using the Calendar Day View

When the Calendar is displaying a single day, it looks as shown in Figure 11.3. Times of the day are listed at the left edge of the window, and each appointment is displayed in its assigned time slot. Use the scroll bar to bring different times into view. Any all-day events for the day will be displayed at the top of the window.

FIGURE 11.3

The Outlook Calendar displaying a single day's appointments.



Click an appointment to select it — it will display with a black border and small handles (boxes) on the top and bottom border. You can:

- Point at the appointment and drag to move it to a different time slot.
- Point at one of the handles and drag it to change either the start or stop time.

If you double-click an appointment, it will open for editing, as explained later in this chapter.

Using the Calendar Week View

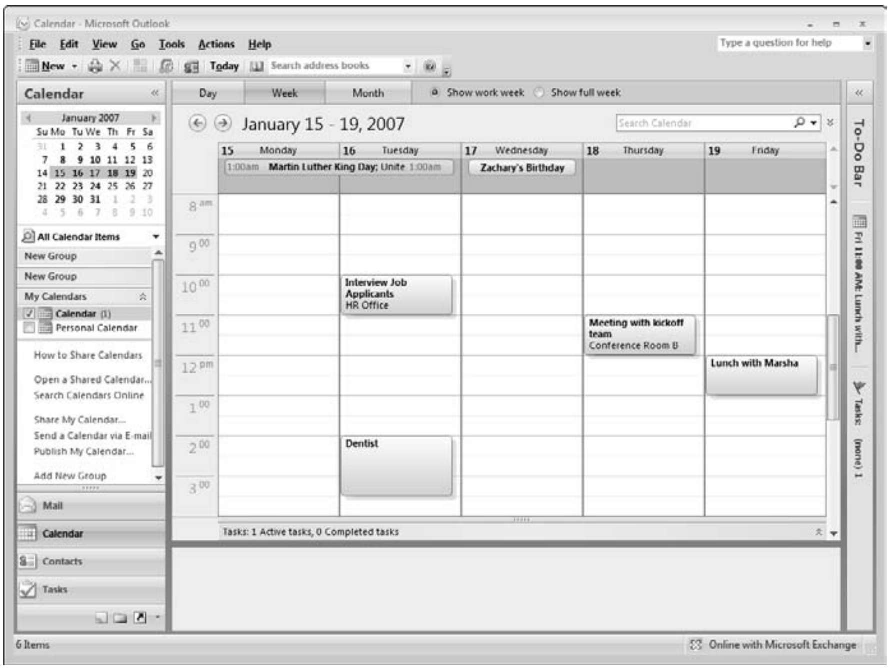
The Calendar Week view is shown in Figure 11.4. This example shows only the work week — you can display the full seven-day week by selecting the Show Full Week option at the top of the window.

In essence, the Week view is five or seven single-day views side-by-side and you can perform the same actions as described for the Day view. You can also drag an appointment to a different day.

NOTE **You'll note in the figure that when an appointment is selected, its details are displayed at the bottom of the window in the reading pane. This can be useful when the Calendar itself is too crowded to show these details for each appointment.**

FIGURE 11.4

The Outlook Calendar displaying an entire week's appointments.



Displaying the Reading Pane

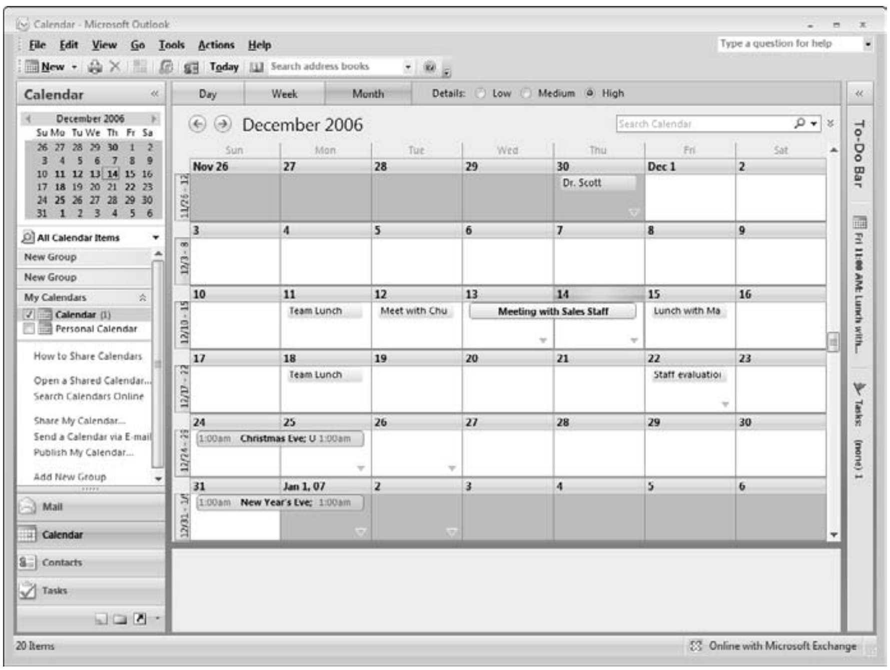
If the reading pane is not displayed, turn it on by selecting Reading Pane from the View menu and then selecting the desired position — bottom or right. You can also toggle the reading pane display with the Reading Pane button on the toolbar.

Using the Calendar Month View

Month view shows an entire month of appointments, as shown in Figure 11.5. Appointments for each day are displayed in order but without time details. If an all-day event exists for the day, it is displayed at the top with a line around it — for example, the “Meeting with Sales Staff” appointment in the figure on the 13th and 14th. If there are more appointments for a day than can be shown, a small down arrow is displayed. Click the arrow to open the single day display where you can view all appointments for that date.

FIGURE 11.5

The Outlook Calendar displaying a month’s appointments.



Customizing the Calendar View

If you open the Current View list on the toolbar you'll see an item called *Define Views*. This command lets you define a custom view for the Calendar, and is covered in Chapter 19.

The figure shows the month display with the High option selected for details. You can also select Low or Medium details:

- **Low:** Shows only all-day events. Appointments with specific start and stop times are not displayed.
- **Medium:** All-day events are displayed as usual. Appointments with specific start and stop times are displayed as shaded lines or rectangles with the position and thickness of the line or rectangle indicating the approximate time and duration of the appointment.

Using the To-Do Bar with Appointments

Outlook's To-Do Bar can be useful for working with Calendar items. To display the To-Do Bar, select To-Do Bar from the View menu and then select Normal. The To-Do Bar is shown in Figure 11.6.

FIGURE 11.6

The To-Do Bar can display the Date Navigator and upcoming appointments.

To-Do Bar Appointment Display

You can specify how many appointments are displayed in the To-Do Bar — the default is three. However many you choose to display, the To-Do Bar always displays the appointments that are coming up the soonest.

The To-Do Bar can display three items:

- The Date Navigator, a small monthly calendar whose features were explained earlier in this chapter. If the Date Navigator is displayed in the To-Do Bar it will not be displayed in the navigation pane.
- A list of appointments for the current week.
- A list of tasks. Tasks are not directly related to the Calendar and are explained in Chapter 15.

You can control what is displayed on the To-Do Bar. You can display all, two, or one of the items in the preceding list. To change the To-Do Bar display, select To-Do Bar from the View menu and then check or uncheck the individual items — Date Navigator, Appointments, and Task List — on the next menu. You can also select Options from this menu to display the To-Do Bar Options dialog box, shown in Figure 11.7. Here you can turn the display of individual items on or off as well as specify how many months are displayed in the Date Navigator and how many appointments are displayed.

FIGURE 11.7

Setting To-Do Bar display options.

Working with Appointments

An Outlook appointment can be very simple, or you can use Outlook's tools to add various features and options to an appointment. Start with the basics of creating a simple appointment and then look at the various options.

Creating a Simple Appointment

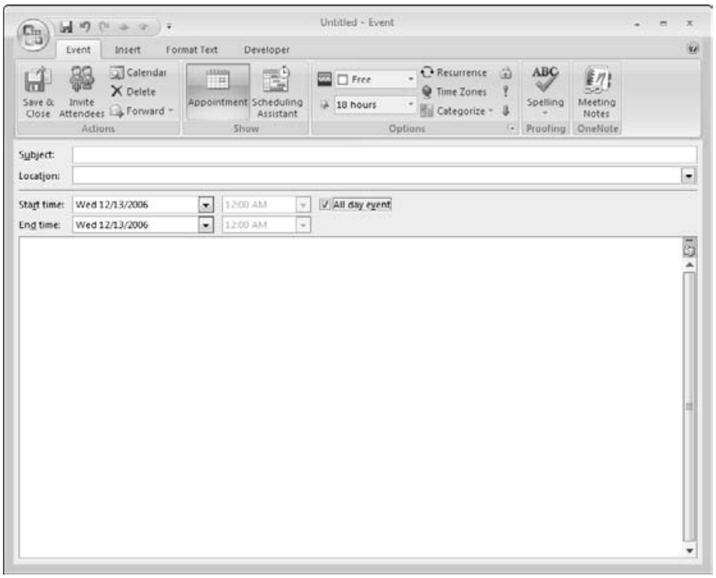
To create a simple appointment, make sure that Outlook is displaying the Calendar. Then you do either of the following:

- Click the New button on the toolbar. Outlook opens a new appointment form for whatever day is selected in the Calendar.
- Double-click a day on the Calendar. Outlook opens a new appointment form for that day.

The appointment form is shown in Figure 11.8 before any information has been entered. Then:

FIGURE 11.8

An Outlook appointment form.

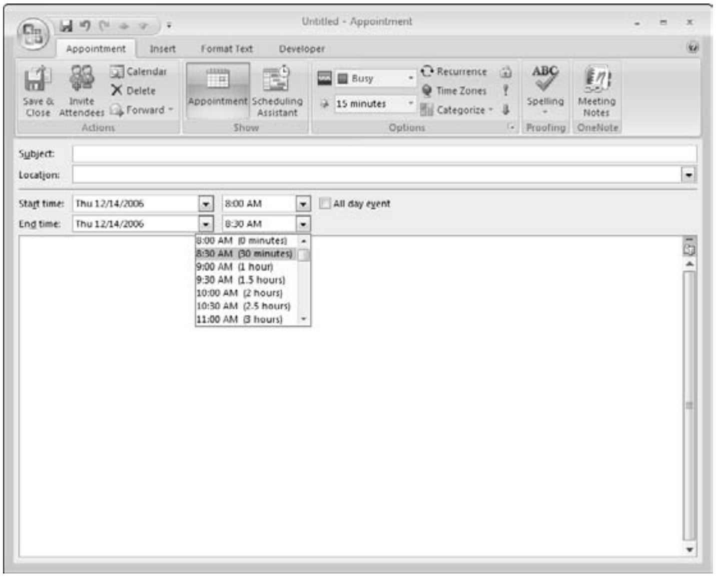


1. At a minimum, you must enter a subject for the appointment. This is the title of the appointment and is displayed in the Calendar — or at least part of it is, depending on the length.
2. Optionally, enter a location for the appointment. If you click the arrow adjacent to the Location field, Outlook will display a list of previously used locations from which you can select. Otherwise, just type the location into the field. Space allowing, the location displays along with the appointment subject in the Calendar.
3. If necessary, adjust the start and/or stop date by clicking the arrow next to the displayed date and selecting from the calendar that Outlook displays. An appointment could span two or more days, if needed.

4. If the appointment is an all-day event, make sure the All Day Event option is selected. An all-day event marks one or more entire days as busy with no specific start and stop times.
5. If the appointment is not an all-day event, make sure the All Day Event option is not checked. Outlook will display fields for the start and stop times.
6. To select a start or stop time, click the adjacent arrow and select from the list displayed (see Figure 11.9).

FIGURE 11.9

Selecting the stop time for an appointment.



7. Optionally, enter any desired notes in the field provided.
8. Click the Save & Close button on the ribbon.

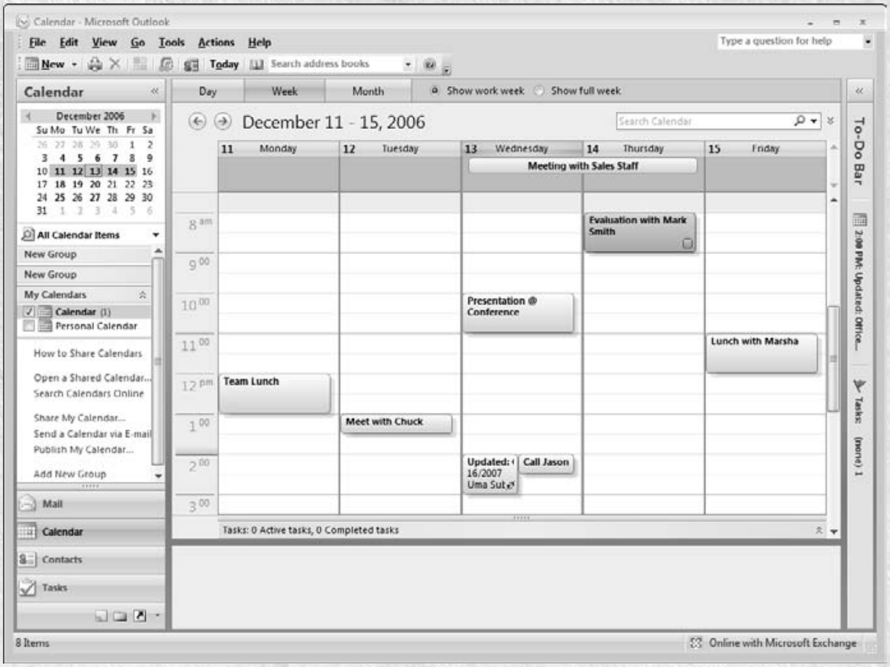
WARNING **When you create an appointment that is an all-day event, Outlook does not mark the time as "busy" but rather keeps it marked as "free." If you want an all-day event to display on the Scheduling Page as either "tentative" or "busy" you must explicitly select this option in the Options section of the Event ribbon.**

Editing and Deleting Appointments

To edit an appointment, double-click it in Calendar view to open the appointment form. Make any needed changes and click the Save & Close button on the ribbon.

Dealing with Conflicts

Outlook does not specifically warn you of potential conflicts — you are free to schedule overlapping appointments if you wish. When there's an overlap, Outlook displays a striped bar between the appointments in Week view and also in Day view.



Outlook displays a striped bar between conflicting appointments.

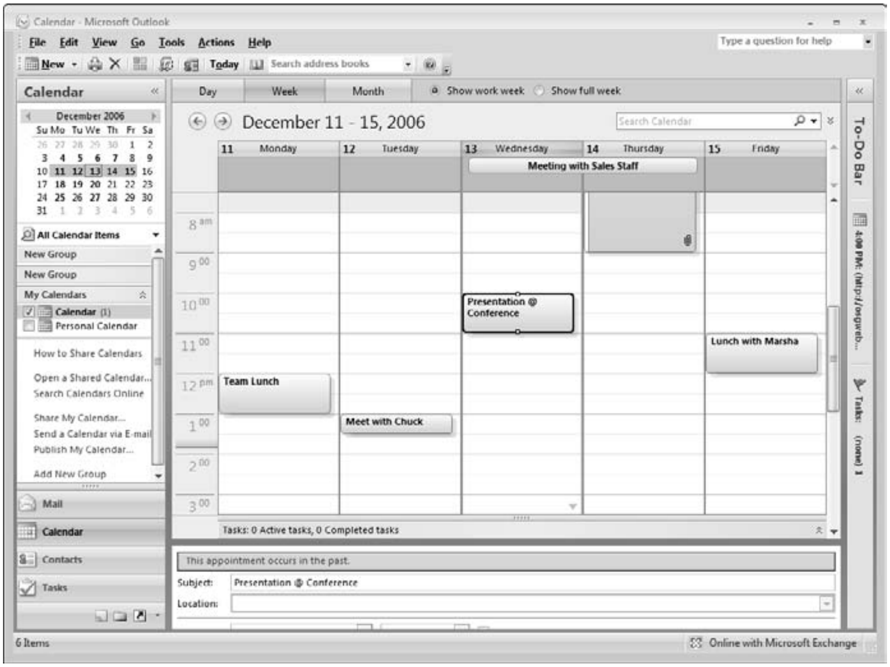
To delete an appointment, click it in Calendar view to select it and press Del.

If you simply want to change the duration of an appointment, you can do so without opening the appointment form. When you select the appointment in the Calendar by clicking it, it will display small square handles on its border as shown in Figure 11.10. For a regular appointment, the handles will be at the top and bottom, as in the figure. Drag the top or bottom handle to change the appointment's start or stop time, respectively. For an all-day event the handles will be on the left and right edges, and can be dragged to change the start or stop time.

You can also change an appointment's time and/or date, without changing its duration, by pointing at the appointment and dragging it the new position on the Calendar.

FIGURE 11.10

Drag a selected appointment's handles to change its duration.



Appointment Options

When you create an appointment, there are several optional features you may want to use. They are described here.

Scheduling Recurring Events

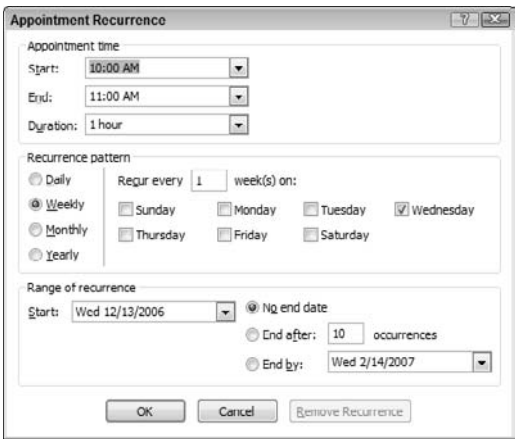
Some events occur on a regular basis. Perhaps you have a chiropractor appointment at 10:00 AM every Monday, or a company strategy meeting on the first Tuesday of each month. You can enter such appointments only once and have Outlook create all the recurrences automatically. Here's how:

1. Use the techniques that you learned earlier in this chapter to create an appointment for the first instance, but do not save and close it.
2. In the appointment form, click the Recurrence button on the Appointment ribbon. Outlook displays the Appointment Recurrence dialog box as shown in Figure 11.11.
3. In the Appointment Time section of the dialog box, make sure that the start time and stop time are correct.
4. In the Recurrence Pattern section, select Daily, Weekly, Monthly, or Yearly.

5. Depending on the option selected in the previous step, enter other recurrence details:
   - **Daily:** Specify how often the appointment recurs (for example, every two days) or that it occurs every weekday.
   - **Weekly:** Specify how often the appointment recurs (for example, every week) and then on which day or days.
   - **Monthly:** Specify how often the appointment recurs (for example, every three months) and on which day. You can select a day by number, such as the 15th of every month. You can also select a day by day of week, such as the second Tuesday of the month.
6. Under Range of Recurrence, enter the starting date and then specify when the recurrences end. Your choices are
   - No end date.
   - End after a certain number of occurrences.
   - End by a specified date.
7. Click OK to return to the appointment form.
8. Complete any additional appointment details, as needed.
9. Click Save & Close.

FIGURE 11.11

Defining a recurring appointment.



When you open an existing recurring appointment for editing, you can click the Recurrence button to open the Appointment Recurrence dialog box to modify the recurrence pattern. You can also remove the recurrence by clicking the Remove Recurrence button in this dialog box. Outlook will remove all instances of the appointment from the Calendar except the next one.

If you try to delete a recurring appointment, Outlook will give you the option of deleting all occurrences of the appointment or just the current one.

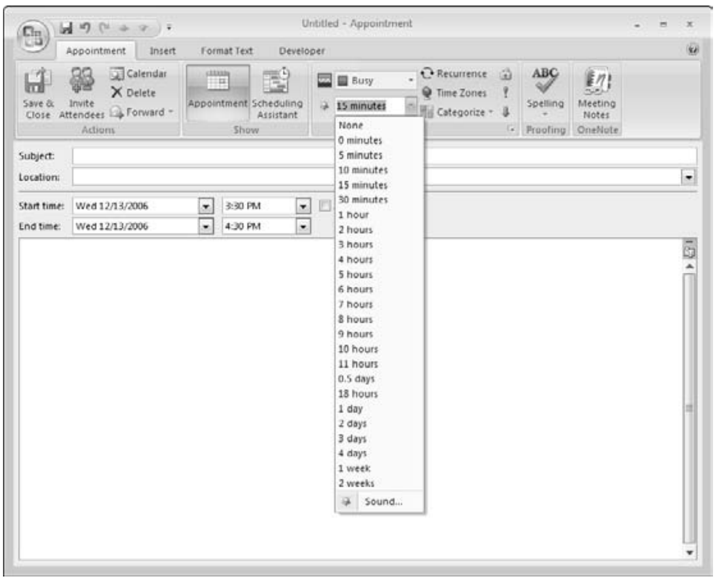
Using Appointment Reminders

Outlook can remind you of an appointment by displaying a dialog box and playing a sound. You can specify how much advance notice you get and also change the sound that is played. You can also turn reminders off. To set a reminder:

1. Create the appointment, or open an existing one for editing.
2. Click the Reminder list on the Appointment ribbon (see Figure 11.12).
3. Select the desired duration of the advance warning, from 0 minutes to 2 weeks. The default is 15 minutes before the start time, although you can change this in Calendar Options (covered later in this chapter). Select None for no reminder.
4. Select Sound to specify the sound played when a reminder is displayed. Turn off the Play This Sound option if you do not want a sound played (a dialog box is displayed).
5. Click OK to return to the appointment form.

FIGURE 11.12

Specifying the reminder interval for an appointment.

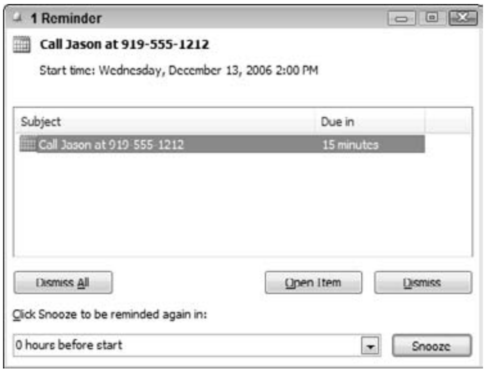


When a reminder comes due, Outlook plays the sound (if one was specified for the appointment) and displays the dialog box shown in Figure 11.13. If there is more than one reminder due, they will all be listed. The actions you can take are

- Click Dismiss to dismiss the selected reminder.
- If more than one reminder is listed, click Dismiss All to dismiss all the listed reminders.
- Click Open Item to open the corresponding appointment.
- Click Snooze to be reminded again in the specified time, selected from the adjacent list. You could, for example, choose to be reminded 5 minutes before the appointment's start time, or in 10 minutes from the current time.

FIGURE 11.13

The Appointment Reminder dialog box.



NOTE **When you dismiss a reminder, it does not affect the appointment itself, which will remain in your calendar.**

Inviting Meeting Attendees

Outlook lets you invite other people to a meeting via email, and handle their responses automatically. Because this is a complex topic, it is covered in its own chapter along with tasks (Chapter 12).

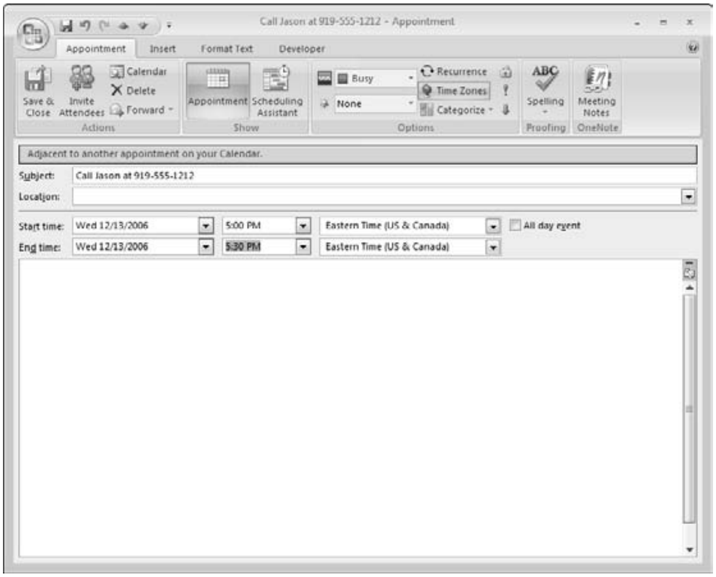
Using Other Time Zones

By default, Outlook appointments use the time zone that your system is set up to use. At times you may want to use another time zone, for example if you are in New York and your client says "Call me at 8:00 AM, my time." You may not know the number of hours' difference, but as long as you know his time zone you are all set.

When you have the appointment form open, click the Time Zones button on the ribbon to display time zone selectors next to the start and stop time fields (see Figure 11.14). Change either the start or stop time zone to the desired setting; the other changes to the same thing. Now the start and stop times you enter are interpreted as being in the selected time zone, and the appointment is displayed in the correct local time slot. For example, if you are in the Eastern time zone and enter an appointment from 8:00 AM to 9:00 AM in the Pacific time zone, the appointment will display between 11:00 AM and 12:00 PM on your calendar because the Pacific zone is three hours behind the Eastern zone.

FIGURE 11.14

Basing an appointment on a different time zone than the one you are in.



Forwarding an Appointment

Outlook lets you forward an appointment to an email recipient. Forwarding is different from inviting an attendee to a meeting (covered elsewhere in the next chapter). There are two ways to forward an Outlook appointment:

- Open the appointment and click the Forward button on the Appointment ribbon.
- Right-click the appointment in the Calendar and select Forward from the Context menu.

Another Way to Forward an Appointment

Forwarding an appointment as described here has exactly the same result as inserting an appointment item into an email message, as was described in Chapter 4. Briefly, you create the email message first, then use the Attach Item command to browse for the desired appointment in the Calendar folder.

In either case, Outlook creates a new email message with the appointment attached as an Outlook item and the title of the appointment inserted in the Subject field. You then address and complete the email message as usual. If you are using Outlook with an Exchange Server account, the appointment itself is forwarded without being attached to an email message.

When the recipient receives a forwarded appointment, he or she can double-click the attachment to open it. It will open in an appointment window, and the user can save it to his or her calendar or discard it as desired. Of course, the recipient must be using Outlook or another program that supports the Outlook appointment format.

Another forwarding option for appointments is the iCalendar format. This is a widely supported format for calendar information and is supported by Outlook as well as many other scheduling programs. If you are not sure that all your recipients are using Outlook, it may be a good idea to use this format when forwarding an appointment. To do so:

1. In an open appointment, click the arrow next to the Forward button.
2. Select Forward as iCalendar from the menu. Outlook creates a new email message with the iCalendar attached.
3. Complete and send the message as usual.

Assigning Appointments to Categories

As with most Outlook items, an appointment can be assigned to a category. Outlook comes with six predefined and color-coded categories. Initially they are named according to their color, but you can change this to more meaningful names such as “Work” or “Personal.” You learn more about Outlook categories in Chapter 17.

There are two ways to assign an appointment to a category:

- With the appointment open, click the Categorize button and select the desired category from the list displayed. Select Clear All Categories to remove any assigned categories from the appointment.
- In the Calendar, right-click the appointment and select Categorize from the context menu. Then, select the desired category.

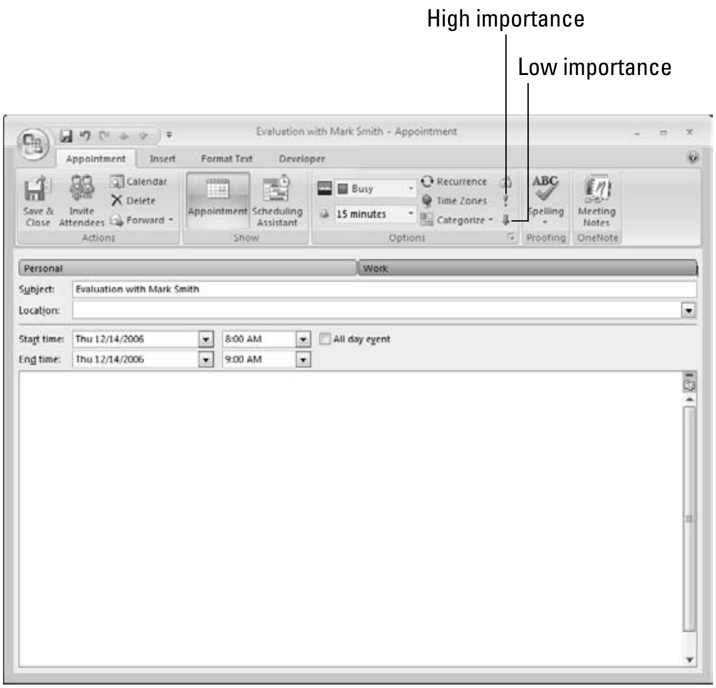
An appointment, like other Outlook items, can be assigned to more than one category. In the Calendar, a categorized appointment is displayed in the color of the assigned category.

Setting Appointment Importance

By default, all appointments you create are assigned normal importance. You can assign either low or high importance to an open appointment by clicking the corresponding button on the ribbon, as shown in Figure 11.15. Then you can use this importance level as a criterion when using the search feature in your Calendar, as discussed elsewhere in this chapter.

FIGURE 11.15

Assigning low or high importance to an appointment.



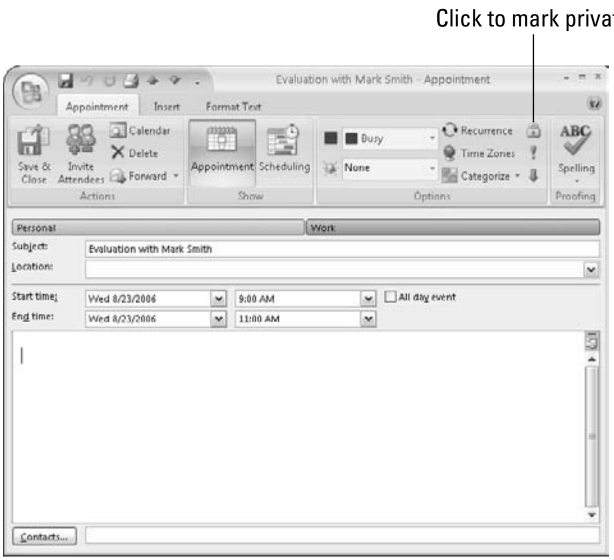
Marking an Appointment as Private

Outlook gives you the ability to publish your calendar so that other people can view your schedule. This topic is covered elsewhere in this chapter. You may at times want to mark an appointment as private so that other people viewing your calendar cannot see the details. They will still be able to see that you are busy during the period of the appointment but will not have access to details about the appointment.

To mark an open appointment as private, click the padlock button on the Appointment ribbon (see Figure 11.16).

FIGURE 11.16

Marking an appointment as private.



Determining How an Appointment Displays on the Scheduling Page

Outlook's Scheduling Page provides a quick visual view of your schedule and the schedules of other people whose calendars you have imported. It is a very useful tool for finding time that is free for all the people you want to attend a meeting. Using the Scheduling Page is covered in detail in the next chapter.

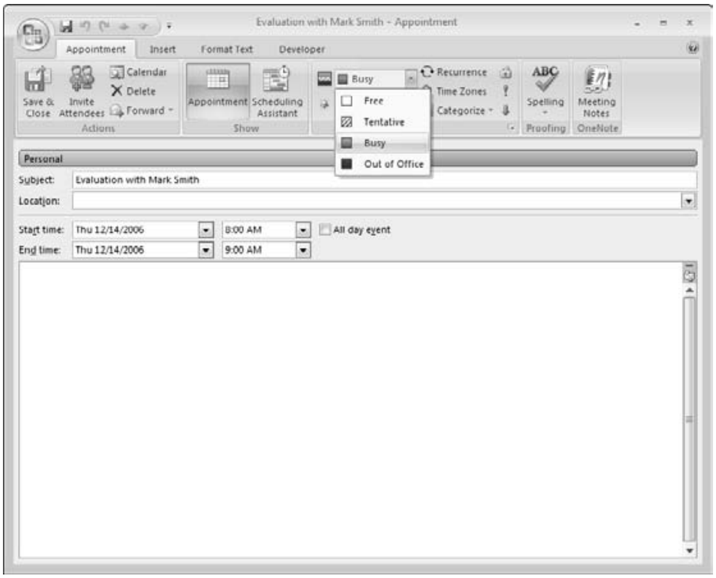
An appointment in your calendar can display in one of several ways on the Scheduling Page — Busy, Tentative, Out of Office, or Free. This affects both your own Scheduling Page as well as that of other people with whom you are sharing your calendar. When you create an appointment, you can specify how it will display. The default is "busy" (except for all-day events as mentioned earlier in this chapter). To do so, click the Show As list on the Appointment ribbon and select from the list (see Figure 11.17).

Why Display an Appointment as "Free?"

It may seem strange that Outlook gives you the option of displaying an appointment as "free" on the Scheduling Page. It makes sense, however, when you realize that some appointments are not critical and can easily be changed. For example, you can just as well get that haircut tomorrow as today. By displaying such appointments as free, you will not prevent other people from scheduling a meeting at that time when they view your schedule.

FIGURE 11.17

Specifying how an appointment will display on the Scheduling Page.



Searching the Calendar

As your calendar becomes filled with appointments past and future, it will become difficult if not impossible to find information by simply scrolling through the Calendar. You can use the search feature to filter the Calendar to show just the information you want. For example, you could filter to show only appointments within a certain month assigned to a specific category.

For a basic search, enter your search term in the Search Calendar box at the top right of the Calendar display (see Figure 11.18). You can also click the down arrow to select from previously

used search terms. Outlook automatically searches as you enter the term and displays only matching appointments (or a message if there are no matching entries). Click the X adjacent to the Search box to cancel the search and return to displaying all Calendar items.

If you need more control over the search, click the double down arrow at the top-right corner of the Calendar display. Outlook displays additional criterion fields as shown in Figure 11.19. Each field lets you enter a search term or select from a drop-down list. As you make entries, the Calendar display is automatically filtered to show only matching entries. You can also take the following actions:

- To change a displayed criterion field — for example, from Categories to Sensitivity — click the arrow adjacent to the field name and select from the list displayed.
- To remove a criterion field, click the arrow adjacent to the field name and select Remove.
- To add a new criterion field, click Add Criteria and select from the list.
- To cancel the search and display all Calendar entries, click the X to the right of the Search Calendar box.
- To hide the additional criterion fields, click the double up arrow at the top-right corner of the Calendar display.

FIGURE 11.18

Performing a basic search of the Calendar.

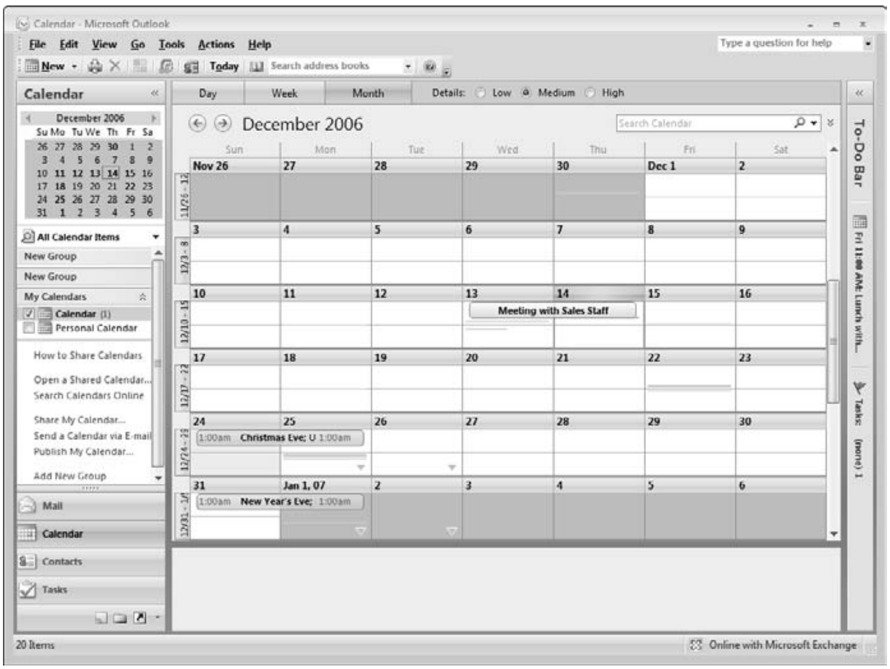
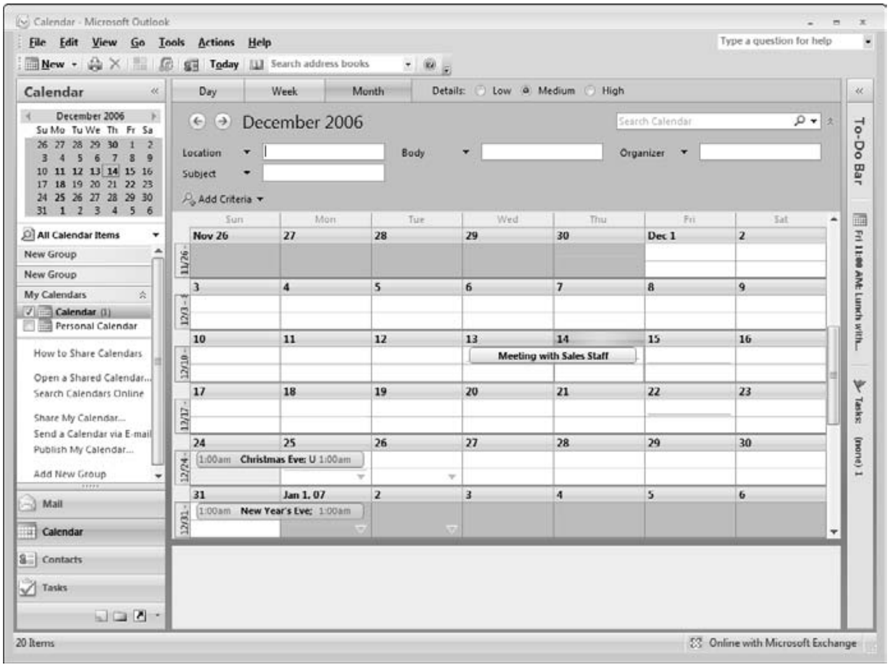


FIGURE 11.19

Performing an advanced search of the Calendar.



Sharing Your Calendar with Others

Outlook lets you publish your calendar so other people can have access to the information it contains. For example, if you manage a bowling team you can keep the team schedule in an Outlook calendar and publish it so team members can access it on the Internet.

You have two options as to how your calendar is shared:

- A *calendar snapshot* that is a static copy of your calendar at the time it is published.
- A *dynamic calendar* that can be automatically updated with changes you make to your calendar.

You also have two options as to where the calendar is published (these are applicable only to dynamic calendar sharing):

- To Microsoft Office Online, a Microsoft service that uses Windows Live ID credentials to control access to the information.
- To a web server that supports the WebDAV protocol.

Calendar Sharing with Exchange

Outlook users who have a Microsoft Exchange account have additional calendar sharing options available to them. These are covered in Chapter 28, which deals with Exchange accounts.

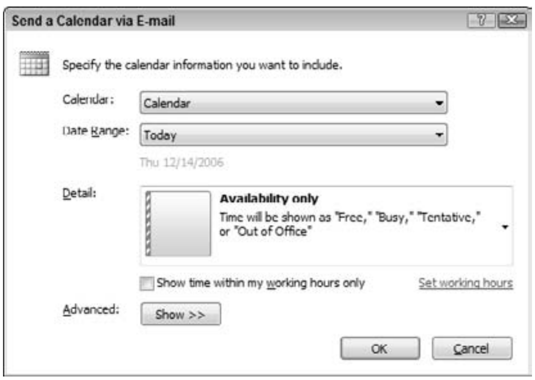
Sending a Calendar Snapshot

A calendar snapshot is sent as part of an email message. To send a calendar snapshot, make sure that you are in Calendar view. Then, click the Send a Calendar via E-Mail link on the navigation pane. Outlook will create a new email message and display the Send a Calendar via E-mail dialog box (Figure 11.20). Make entries in this dialog box as follows:

1. In the Calendar list, select the calendar to use. This is relevant only if you have more than one calendar.
2. In the Date Range list, select the range of dates to include.
3. In the Detail list, specify how much detail should be included. You can select Availability Only, Limited Details, or Full Details.
4. Select the Show Time Within My Working Hours Only option to limit the published information to the times defined in Outlook as working hours.
5. Click OK.

FIGURE 11.20

Sending a Calendar snapshot via email.



After you close this dialog box, you are returned to the new email message. The calendar will have been inserted into the body of the message and also added as an attachment. You can then address and send the message as usual. When the recipient gets the message, he can either view the calendar in the message or open the attached file to get information about your schedule.

Publishing a Calendar to Microsoft Office Online

Microsoft Office Online is a free service offered to Office users. One of its features is the capability to publish your Outlook Calendar so that other people can view it. To use Microsoft Office Online you need an account. If you already have a Microsoft Passport account you can use that login. If not, you will be prompted to create your account when you first publish your calendar.

To publish your calendar, you must be in Calendar view. Then, click the Publish My Calendar link in the navigation pane. Outlook will take you through the steps of signing into Office Online (or creating an account if needed) and will then display the dialog box shown in Figure 11.21. Fill in this dialog box as follows:

- **Time Span:** Select the span of time to be published.
- **Detail:** Specify how much detail should be included. You can select Availability Only, Limited Details, or Complete Details.
- **Show Time Within My Working Hours Only:** Select this option to limit the published information to the times defined in Outlook as working hours. Click the adjacent Set Working Hours link if you want to view or modify the working hours.
- **Permissions:** Select whether the calendar will be restricted to people you invite or accessible by anyone.
- **Description:** Depending on where you are publishing to, you may be able to enter a description of the calendar that will help other people to find it.
- **Advanced:** Click this button to specify the upload method. You can specify whether or not changes to your calendar will be uploaded automatically. Automatic is the default and is suitable for most situations. If you do not select automatic updating, you will have to publish the calendar again to make changes available.

When you click OK, Outlook publishes your calendar and asks you whether you want to invite others to share the calendar. If you select Yes, Outlook will create an email message that contains a link to the just-published calendar. Send the message to the people you want to invite to share your calendar. If you published the calendar with restricted access, people will need a Microsoft Passport account associated with the email address you sent the invitation to in order to view the calendar.

FIGURE 11.21

Publishing your calendar to Microsoft Office Online.

Publishing a Calendar to a Web Server

Another way to make your calendar available to others is to publish it to a web server. Then, anyone with access to that server can view your schedule using a web browser such as Internet Explorer. You cannot publish a calendar to just any web server but only to one that supports the WebDAV protocol (World Wide Web Distributed Authoring and Versioning). If a server is available to you, your IT department will provide you with its location (URL) and your login information. Once you have this information, you can publish your calendar as follows:

1. Make sure that you are in Calendar view.
2. In the navigation pane, right-click the calendar that you want to publish.
3. From the menu, select Publish to Internet.
4. From the next menu, select Publish to WebDAV Server. Outlook displays the Publish Calendar to Custom Server dialog box as shown in Figure 11.22.
5. In the Location box, enter the location (URL) of the server.
6. Under Time Span, select the span of time that you want to be published.
7. From the Detail list, select the amount of detail to be included in the published calendar. You can select Availability Only, Limited Details, or Full Details.
8. Select the Show Time Within My Working Hours Only option to limit the published information to the times defined in Outlook as working hours.
9. Click the Advanced button to specify whether changes to your calendar will be uploaded automatically.
10. Click OK.

FIGURE 11.22

Publishing your calendar to a web server.

At this point, depending on how the server is set up, you may be asked for your login and password. Once you have entered this information correctly, the calendar will be published and will be available for others to view.

WARNING **When you publish a calendar to a web server, you do not have any control over who can view it. Rather, restrictions (if any) are set by the web site administrator.**

Inviting Others to View Your Calendar

Once you have published your calendar to a web server, you need to let your colleagues and friends know about it so they can view it. When publishing to Microsoft Office Online, you can do this as the last step of the publishing process, as described earlier. You can also invite people at a later time, whether for a calendar published on Office Online or on a web server. Here's how:

1. In the navigation pane, right-click the calendar.
2. From the menu, select Share Calendar (or whatever the name of the calendar is). Outlook creates an email message containing a link to the calendar. Note: The Share Calendar command will be available only if the calendar has been published.
3. Address the message to the people you want to invite.
4. If desired, add text to the body of the message.
5. Click Send.

Other Actions with Published Calendars

Once you have published a calendar, there are several other actions you can take with it. These commands are all accessed by right-clicking the calendar in the navigation pane and selecting Publish to Internet from the menu. Then, on the next menu:

- Select Change Publishing Options if you want to change access restrictions, upload method, or any other detail of how the calendar is published.
- Select Stop Sharing to make the calendar unavailable. It will remain on the server and sharing can be re-enabled at a later date.
- Select Change Sharing Permissions if you want to change who can access the published calendar.
- Select Remove from Server to delete the calendar from the server.

Subscribing to Internet Calendars

Outlook supports *Internet calendars*, a way for people and organizations to publish a calendar you can subscribe to in Outlook. For example, your employer might publish a calendar of company holidays, or the local soccer team can publish its game schedule. By subscribing to an Internet calendar you can view the information in Outlook—and, it will be updated automatically as needed.

When an Internet calendar is made available, you will be informed of its location by the publisher. Navigate to that location in your web browser and you'll see a link for each published calendar. Click the link and Outlook displays the dialog box shown in Figure 11.23. If you want to change the name that Outlook will display for the calendar, click the Advanced button and make the change. Then click Yes to complete the subscription process.

FIGURE 11.23

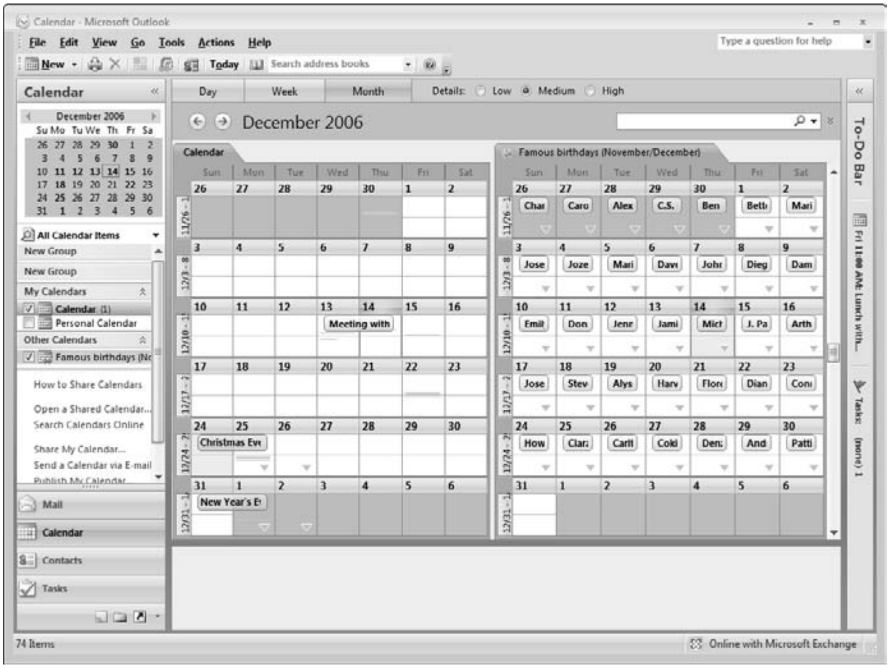
Subscribing to an Internet calendar.

When you have subscribed to one or more Internet calendars, they will be displayed in the navigation pane under Other Calendars, as shown in Figure 11.24. Click a calendar name to display or hide it (as indicated by the adjacent checkmark).

If you right-click a subscribed calendar in the navigation pane, Outlook displays a menu with various commands, including renaming the calendar and deleting it — which also unsubscribes you from the calendar.

FIGURE 11.24

Internet calendars are listed under Other Calendars.



Using Overlay Mode

When you have two or more calendars displayed, they are normally displayed side-by-side as shown in Figure 11.25. Outlook also offers Overlay mode, which can be very useful. In *Overlay mode*, the two calendars are overlapped so that events from both calendars are displayed together, as shown in Figure 11.26. This makes it easy to locate potential conflicts between the two calendars.

To switch Calendar View mode, open the View menu and select View in Side-By-Side Mode or View in Overlay Mode.

FIGURE 11.25

Calendars displayed in Side-by-Side mode.

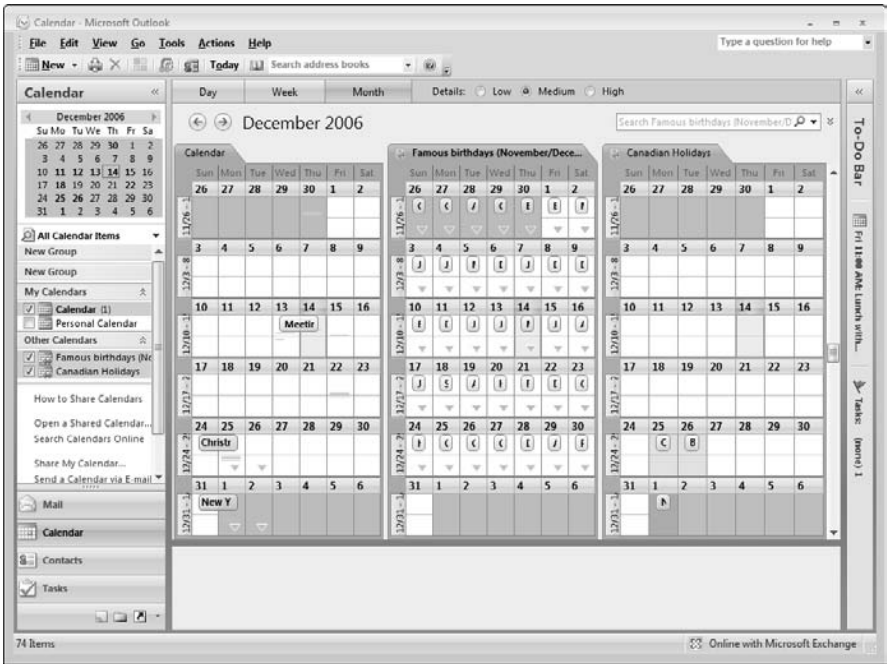
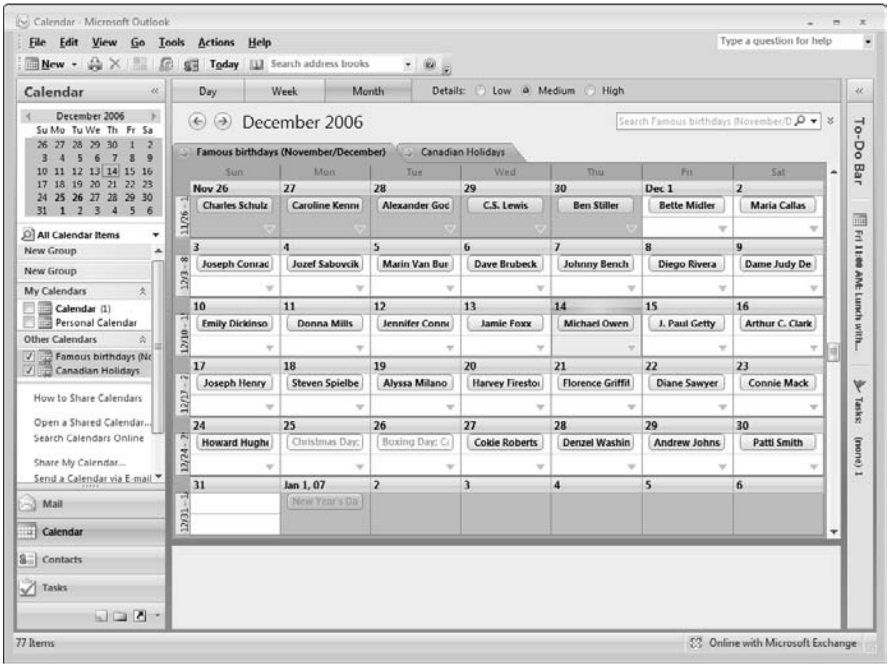


FIGURE 11.26

Calendars displayed in Overlay mode.



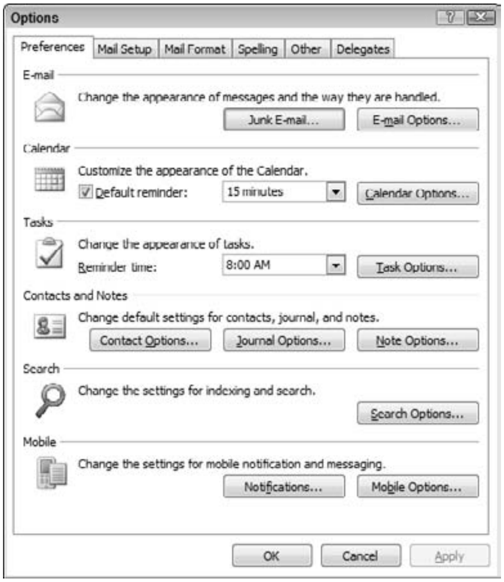
Setting Calendar Options

The Outlook Calendar comes with default settings for many aspects of its operation. As you become familiar with the Calendar you may want to make changes to these settings to customize the Calendar for the way you work. You access Calendar options by selecting Options from the Tools menu and then, in the Options dialog box, clicking the Preferences tab. The Calendar section of this tab is shown in Figure 11.27.

The one option shown here has to do with reminders for appointments. By default, Outlook reminds you of appointments 15 minutes before the start time (you can change this for individual appointments, of course). To change the default lead time, select it from the drop-down list. You can select any time from 0 minutes to 2 weeks. If you do not want a default reminder for messages, uncheck the Default Reminder option.

FIGURE 11.27

The Calendar section of the Preferences tab in the Options dialog box.

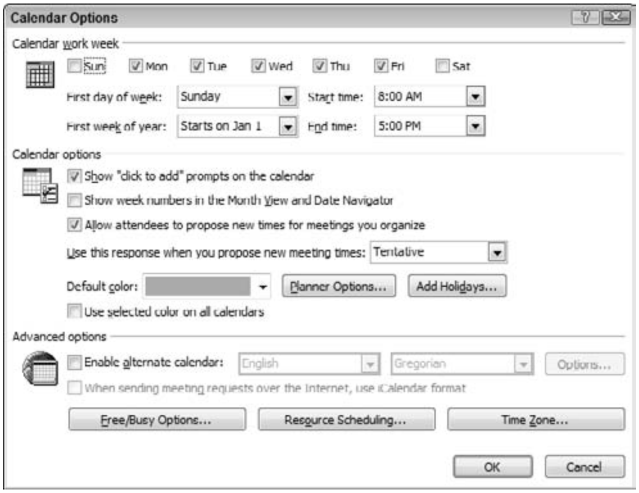


Other Calendar options are accessed by clicking the Calendar Options button to display the Calendar Options dialog box, shown in Figure 11.28. The various options available here are divided into several sections. The first section has to do with how Outlook defines the work week:

- **Calendar Work Week:** Check those days that you want to be considered part of the work week, and uncheck those that you do not.
- **First Day of Week:** Select the day that Outlook will use as the first day of the week for calendar displays.
- **Start Time/End Time:** Select the times of day that Outlook will use for the start and stop of the work day.
- **First Week of Year:** Select how Outlook will determine the first week of the year. The options are Starts on Jan 1 (the week that contains Jan 1), the first week with four days in the new year, and the first week that is entirely in the new year.

FIGURE 11.28

The Calendar Options dialog box.



The next section of the Calendar Options dialog box includes options for a variety of things:

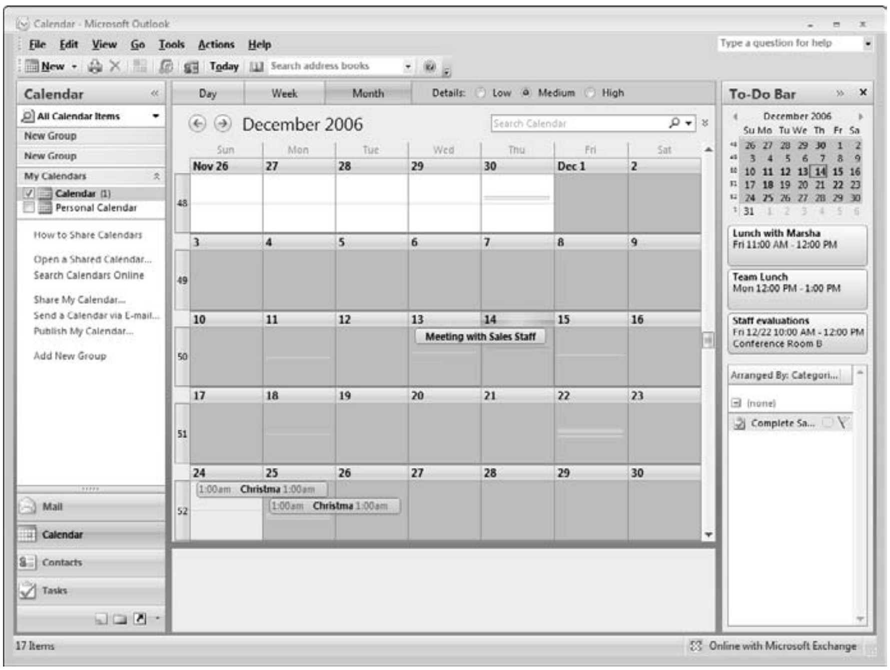
- **Show "Click to Add" Prompts on the Calendar:** If this option is selected, Outlook will display prompts on the calendar where you can click to add an appointment.
- **Show Week Numbers...:** If this option is selected, Outlook will display week numbers (the week of the year) where indicated. An example is shown in Figure 11.29.
- **Allow Attendees to Propose...:** If this option is selected, people whom you invite to meetings are allowed to respond by proposing a new time for the meeting.
- **Use This Response...:** Select from the list to specify whether new meeting times that you propose are marked as Tentative, Accept, or Decline.
- **Default Color:** Select the color to use for the calendar display.
- **Use Selected Color...:** If this option is selected, the color you choose will be used for all calendars you view, not just your own calendar.
- **Planner Options:** Click this button to display the Planner Options dialog box where you can set options for the Meeting Planner and Group Schedule features. These options were discussed earlier in this chapter .
- **Add Holidays:** Lets you copy holidays for one or more specific countries onto your calendar. You select the country or countries from a list.

Finally there are a few advanced options in this dialog box:

- **Enable Alternate Calendar:** Lets you display an alternate calendar in parallel with the default one using the language and calendar structure you select.
- **When Sending Meeting Requests…:** Sends meeting requests in the more widely supported iCalendar format instead of Outlook's proprietary format.
- **Free/Busy Options:** Sets options for publishing your calendar. These options were covered earlier in the chapter.
- **Resource Scheduling:** Sets options for working with meeting requests. These options were covered earlier in the chapter.
- **Time Zone:** Sets the default time zone for your calendar and also permits you to display a second, alternate time zone in the Calendar.

FIGURE 11.29

Outlook can display week numbers in the Date Navigator, shown here, and also in the Month view.



Summary

Outlook's Calendar is a powerful and flexible tool for keeping track of your appointments and other time commitments. Much more than a simple date book, the Outlook Calendar can do things such as reminding you of an upcoming appointment and sharing your schedule with others.

Chapter 12

Working with Schedules and Meetings

IN THIS CHAPTER

In the previous chapter, you learned how you can use Outlook to keep track of appointments. As useful as this is, it is only one of the tools Outlook provides to help you organize and manage your time. Scheduling goes a step further. In a nutshell, *scheduling* refers to arranging your time commitments so they do not conflict with other commitments you may have or with commitments that other people have. For example, scanning your calendar to find a mutually agreeable night to go to dinner with friends is scheduling, as is choosing a meeting time at work that will permit the whole project team to attend.

Understanding Scheduling

An *appointment* is an event that lasts less than a full day and does not require coordination with anyone else's time. A *meeting*, on the other hand, is an event that must be coordinated with one or more people's schedules. Outlook provides two tools that help to automate the task of setting up meetings:

- Viewing other people's calendars to see when they are free.
- Sending meeting requests via email allowing the recipients to accept or decline.

You may use just one of these tools to schedule a meeting, or you may use both. The following section takes a look at how this is done.

Creating a Meeting

In many ways, creating a meeting is the same as creating an appointment, as you learned how to do in the previous chapter. As with an appointment, you can assign a meeting to a category, associate it with one or more contacts, and so on. This section focuses on those aspects unique to creating a meeting.

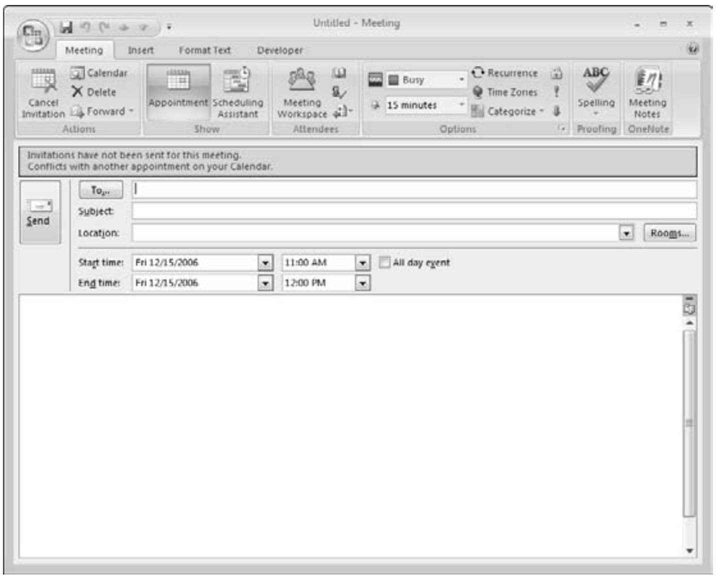
To create a new meeting, select Meeting Request from the New menu or press Ctrl+Shift+Q. Outlook opens a new, blank meeting form as shown in Figure 12.1. This form is very similar to the new appointment form. The differences are

- It has a Send button instead of a Save & Close button.
- It has a To field.
- It has a Cancel Invitation button in place of an Invite Attendees button.

You see how these new elements are used soon.

FIGURE 12.1

Creating a new meeting.



To continue creating the meeting, follow these steps:

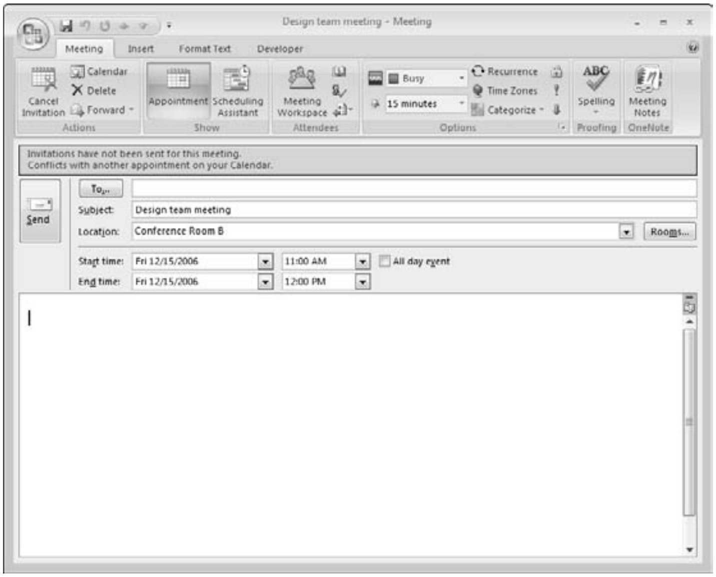
NOTE **Please note that these steps do not all have to be performed in this precise order.**

1. Enter a subject for the meeting in the Subject field.
2. Enter the meeting location in the Location field, or click the adjacent down arrow to select from a list of recently used locations. This is important so the meeting invitees will know where the meeting is.
3. Specify the date of the meeting and the start and end time in the corresponding fields.
4. Look at the message just above the To field. It will tell you that invitations for this meeting have not been sent yet. If the time and date you selected conflict with an existing appointment, it will also inform you of this fact, as shown in Figure 12.2. If there is a conflict you can use the Scheduling tab to resolve it, as described in the next section. If not, continue with step 5.
5. Click the To button to display the Select Attendees and Resources dialog box as shown in Figure 12.3. Resources can be scheduled only if you are using an Exchange Server account.
6. Select individual attendees and click the appropriate button to place them in the Required or Optional field depending on whether their attendance at the meeting is required or optional.
7. Click OK to return to the meeting form. You'll see the selected attendees are now listed in the To field.
8. Click the Send button to send the invitation to the invitees and add the meeting to your Calendar.

When an invitee receives your meeting invitation, she can accept, tentatively accept, decline, or propose a new time for the meeting. Her response is sent back to you and automatically registered by Outlook, as described later in the chapter.

FIGURE 12.2

Outlook tells you whether a proposed meeting time conflicts with an existing appointment.



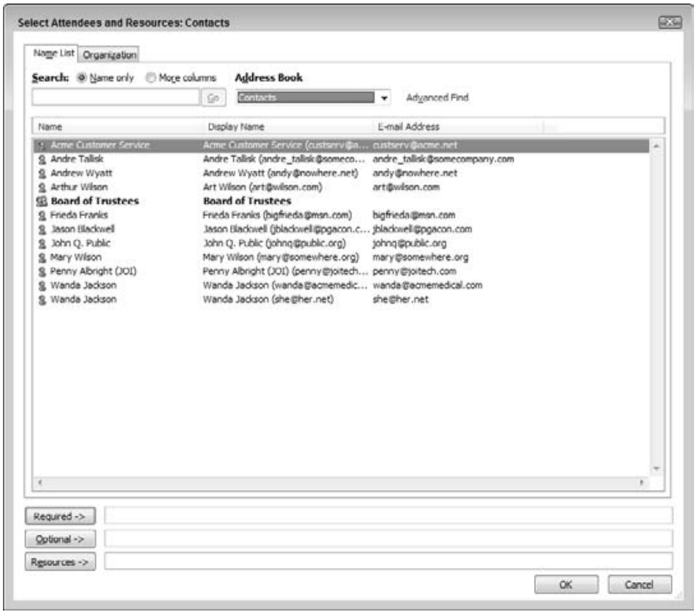
Meeting Request Options

There are two options that you can change before sending a meeting request. You access them by clicking the Responses button in the Attendees section of the ribbon:

- **Request Responses:** This is on by default. If you turn it off, your meeting invitation will be an informative message with the time, date, subject, and place of the meeting, but no request for a response. If the recipient accepts the meeting, it will be added to his calendar but no response will be sent to the meeting organizer.
- **Allow New Time Proposals:** This option determines whether meeting invitees are allowed to respond by proposing a new time for the meeting. Its default setting is on or off depending on the setting of the calendar option Allow Attendees to Propose New Times for Meetings You Organize, as described later in this chapter in the section “Setting Meeting Options.” This option is not available if the Request Responses option is turned off.

FIGURE 12.3

Selecting attendees for a meeting.



Using the Plan a Meeting Command

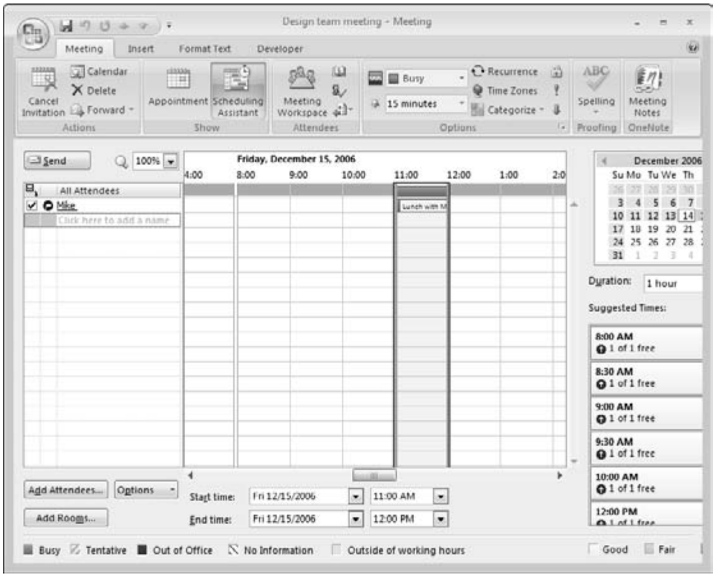
When the Calendar is active, you'll find the Plan a Meeting command on Outlook's Actions menu. This command provides you with another way to plan a meeting and invite attendees. The steps you'll carry out are the same, but are in a different order. The process starts with the Scheduling window (covered in the next section) where you can view your calendar and those of any of your contacts whose calendar information is available. Once you have selected the meeting time, you click the Make Meeting button, which creates a new meeting at the scheduled date and time. You then proceed as described elsewhere to complete the meeting request.

Using the Scheduling Window

The *Scheduling window*, available from the meeting form, provides a visual tool that lets you schedule a meeting so that it does not conflict with existing appointments on your schedule. After you have entered the date and time for a meeting on a meeting form, click the Scheduling button on the ribbon to display the Scheduling window as shown in Figure 12.4.

FIGURE 12.4

The Scheduling window lets you view conflicts with your schedule and optionally other people's schedules.



The elements in this window are

- The Zoom list lets you select how much time is displayed across the window. You can zoom out to show a whole week or zoom in to show just a couple of hours.
- The Attendees list contains your name and the names of any people that you have added to the To field on the meeting form. To add additional attendees, click at the bottom of the list where it says Click Here to Add a Name, or click the Add Others button. People who you add here will be added to the To field for the meeting.
- The row to the right of each attendee's name provides information about their availability, as explained in more detail later.
- The All Attendees row at the top displays free/busy information based on the schedules of all attendees.
- The vertical green and red lines show the start and end of the meeting, respectively.

Viewing Group Schedules

Outlook's Group Schedule feature, which (among other things) allows you to view the schedules of other people when creating a meeting, is available only if you are using a Microsoft Exchange account. You learn more about group schedules in Chapter 28.

The Scheduling window lists availability information for meeting attendees other than yourself only if you are using a Microsoft Exchange Server. Otherwise, the Scheduling window lists attendees' time as "No Information," indicated by diagonal hatching.

If the meeting time you have specified conflicts with one or more schedules — or even if it does not — you can use the AutoPick feature to find another time free for all attendees. Click the AutoPick Next >> button to select the next time period free for all attendees whose schedule information is available; click the << button to look for the nearest earlier time slot. You can also change the meeting time and date manually using the corresponding fields at the bottom of the window.

When you are finished with the Scheduling window, you can do one of the following:

- Click the Appointment button to return to the meeting form and finish setting up the meeting.
- Click the Send button to save the meeting and send requests to all attendees.

Setting Scheduling Options

You can see that the Scheduling window has an Options button. Click this button to do any of the following:

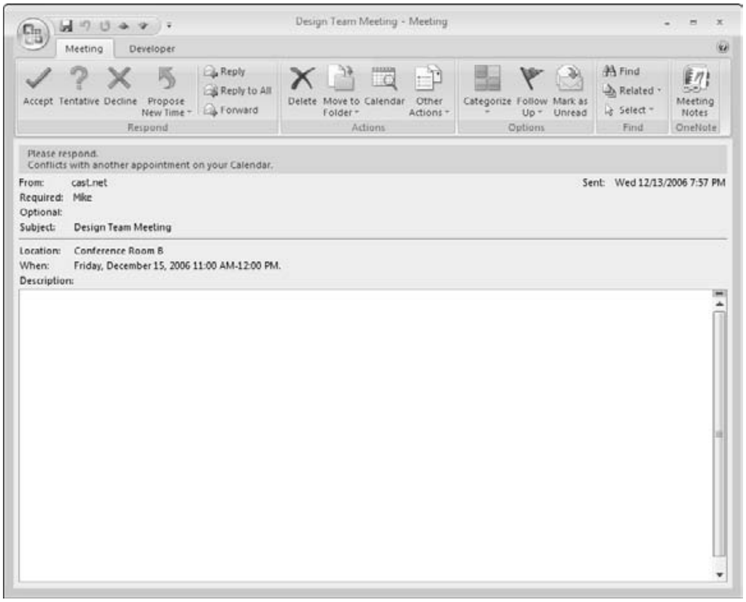
- Specify whether only your working hours, as defined in Outlook, are displayed.
- Specify whether calendar details are displayed.
- Select how the AutoPick feature works in identifying free time. For example, you can specify that all attendees must be free or only that required attendees be free.
- Update the schedule display of other attendees to reflect any changes they may have made to their calendars.

Responding to Meeting Invitations

When a recipient receives a meeting invitation and opens it, it appears as shown in Figure 12.5. They can respond in various ways to an invitation. Responding lets them add the meeting to their own calendar (unless they decline the meeting) and also sends a message to the person who originally proposed the meeting. This lets them keep track of who can and who cannot attend the meeting, and to change the time if needed.

FIGURE 12.5

Responding to a meeting invitation.



In some respects, a meeting invitation is like a regular email message — you can reply to it, forward it, categorize it, and so on. Note that Outlook displays a message just below the ribbon if the meeting conflicts with something already on your calendar. There are four special buttons on the ribbon that let you respond to the invitation.

- **Accept:** Accept the invitation and add the meeting to your calendar. Outlook displays the dialog box shown in Figure 12.6. The options have to do with the response, if any, that is sent to the person who sent you the invitation:
- **Edit the Response Before Sending:** Lets you add text or otherwise edit the response before sending it.
- **Send the Response Now:** Sends the response immediately.
- **Don't Send a Response:** No response is sent.

Click the Tentative button to accept the invitation and add the meeting to your calendar as "tentative." Outlook displays the same dialog box as shown in Figure 12.6, where you select response options.

FIGURE 12.6

Options when responding to a meeting invitation.

Click the Decline button to decline the invitation. Nothing is added to your calendar. You areoffered the same response options as described earlier for Accept.

Click the Propose New Time button if you want to either decline the meeting or accept tentatively while proposing a new time. Outlook opens the Scheduling window and displays your free/busy time as well as the free/busy time of other invitees for whom the information is available. Select the time you want to propose and click the Propose Time button. Outlook creates a new email message with the proposed time information, addressed to the person who sent you the invitation.

Tracking Meeting Invitations

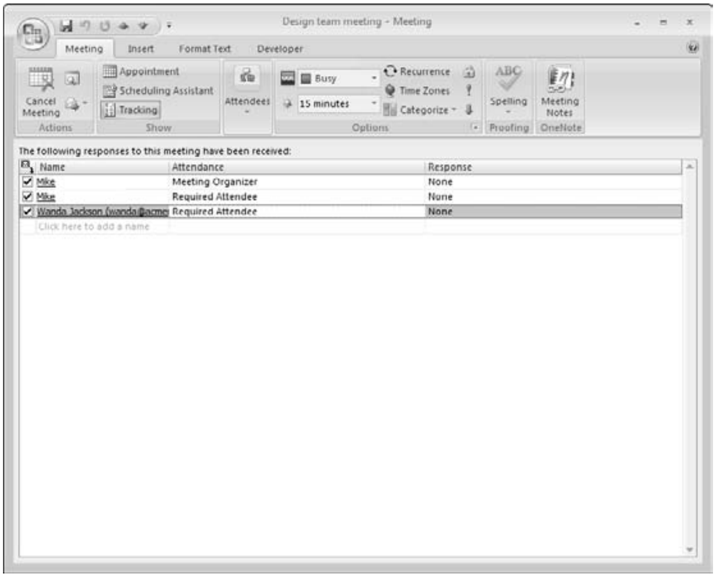
When you have requested responses to a meeting invitation, each response sent will appear in your Inbox. In addition, Outlook automatically registers the response and keeps track of all responses to a particular meeting. You can view this information by opening the meeting (double-click it in Calendar view) and then clicking the Tracking button in the Show section of the ribbon. The Tracking window, shown in Figure 12.7, lists all the people who were invited to the meeting, whether they are a required or an optional attendee, and their response (if any). In the figure, for example, you can see that Wanda Jackson has not yet responded to the invitation.

Meeting Response Handling Options

The behavior described in this section for handling responses to meeting requests is based on Outlook's default settings. You can change how responses to meeting requests are handled as described later in this chapter in the section "Setting Meeting Options."

FIGURE 12.7

Tracking responses to a meeting invitation.



Working with Existing Meetings

A meeting on your calendar can be either a meeting that you organized or a meeting that someone else organized and invited you to.

When you open a meeting that you organized, you can modify various aspects of the meeting including the subject, time, and location. Then, click the Send Update button to send the revised information to all attendees. Other actions you can take are

- Click the Cancel Meeting button in the Actions section of the ribbon to cancel the meeting and send a cancellation message to all attendees. The recipient can open the message and click the Remove from Calendar button to remove the cancelled meeting from her calendar.
- Click the Add or Remove Attendees button in the Attendees section of the ribbon to add or remove attendees. Then, click the Send Update button. You have the option of sending updates only to added and deleted attendees or to all attendees. Attendees you add receive a regular meeting invitation, and deleted attendees receive a message saying the meeting was cancelled.
- Click the Message to Attendees button to create a regular email message or reply addressed to all meeting attendees.

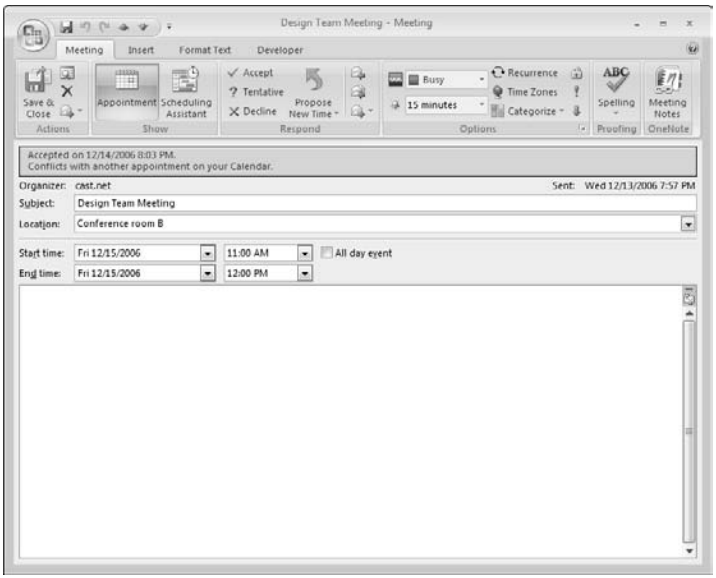
Removing Meeting Attendees

When you remove a previously invited attendee from a meeting, the message he receives says the meeting was cancelled, which is not the case. Also, you are not able to include a note with the message explaining why he has been uninvited. This has the unfortunate potential to cause misunderstandings when a person finds out that a meeting was not actually cancelled but was held without them. Sending a separate email explaining the situation may be advisable in some situations.

When you open a meeting that someone else invited you to, a message is displayed just below the ribbon with information about whether you have responded. For example, the meeting shown in Figure 12.8 indicates the meeting was accepted on December 14.

FIGURE 12.8

Setting options for meeting requests.



When the meeting is open, you can change the subject, location, and date/time, although doing so makes little sense seeing that you are not the meeting organizer. You can also change your response. For example, suppose that you had initially accepted the meeting but something important has come up that will prevent you from attending. You can click Decline to send another response to the organizer informing her of your change in plans.

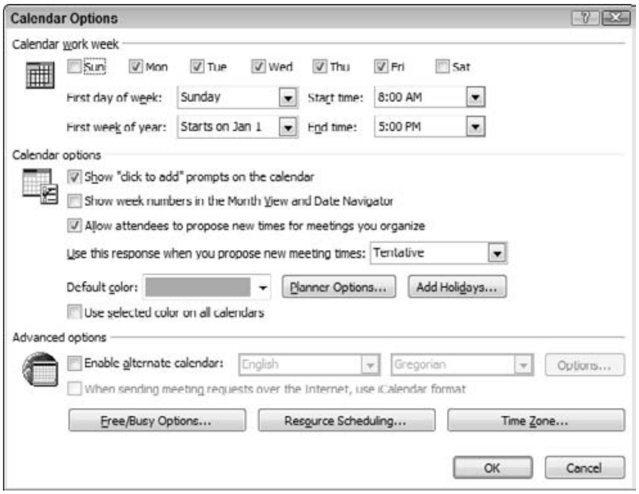
Setting Meeting Options

Outlook has several options that affect the way meeting requests and responses work. Some of these options are found in the Calendar Options dialog box. To view and change these options:

1. Select Options from the Tools menu to display the Options dialog box.
2. If necessary, click the Preferences tab.
3. Click the Calendar Options button to display the Calendar Options dialog box (see Figure 12.9).
4. Set options as described next.
5. Click OK twice to close all dialog boxes.

FIGURE 12.9

Setting options for meeting requests.



Two of the meeting-related options are in the Calendar Options section of this dialog box:

- **Allow Attendees to Propose New Times for Meetings You Organize:** If this option is turned on, people to whom you send meeting invitations can propose new times for the meeting. If not, they will not have this option available to them.
- **Use This Response When You Propose New Meeting Times:** If this option is selected, the widely supported iCalendar format is used for the response when you propose a new meeting time. If not, the less widely supported Outlook format is used. You should leave this option on unless you have a specific reason for turning it off.

The third option is in the Advanced Options section, and determines the format used for sending meeting requests. Again, unless you have a specific reason to do otherwise, you should leave this option turned on so that the more widely supported iCalendar format will be used.

Other options are located in the Tracking Options dialog box. To display this dialog box (which is shown in Figure 12.10):

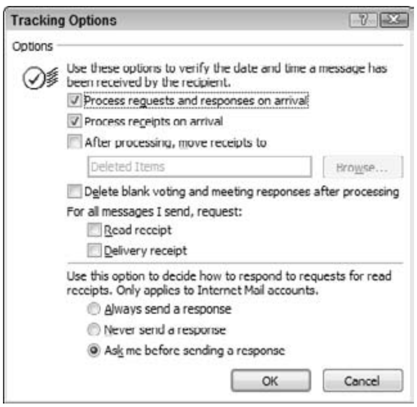
1. Select Options from the Tools menu to display the Options dialog box.
2. If necessary, click the Preferences tab.
3. Click the E-mail Options button to display the E-mail Options dialog box.
4. Click the Tracking Options button.

The relevant options are

- **Process Requests and Responses on Arrival:** If this option is selected, Outlook automatically processes responses to invitations when they arrive — that is, records the response in the tracking section of the meeting request. If not, you will have to open the response message and manually process it.
- **Delete Blank Voting and Meeting Responses After Processing:** If this option is selected, Outlook automatically deletes blank meeting responses after processing. A blank response is one to which the sender has not added text.

FIGURE 12.10

Setting options for handling responses to meeting requests.



Creating and Using a Meeting Workplace

A *Meeting Workplace* is a web site linked to a meeting or project that you are organizing. By giving other meeting attendees access to the Meeting Workspace, you enable a variety of collaboration tools that let everyone share information and meeting materials. A Workspace can be created for a project and then linked to each meeting that you organize for the project. Meeting Workspaces are available only when you are using Outlook in conjunction with a Microsoft SharePoint Services server, which is covered in Chapter 29.

Summary

Outlook may not be able to reduce the number of meetings you have to attend, but it can make it a lot easier to keep track of them and to manage your schedule. Whether you are organizing a meeting or are being invited to one, Outlook's meeting and schedule tools can be a huge help.

Chapter 13

Working with Outlook Notes

Notes is an Outlook feature designed specifically for quick and easy jotting down of those small bits of information we all seem to be inundated with. You can think of them as the electronic equivalent of the sticky notes that most people have pasted all over their monitor, desk, and refrigerator. They are easy to use and understand.

IN THIS CHAPTER

About Outlook Notes

Creating and editing notes

Using optional note features

Viewing and searching your notes

Understanding Outlook Notes

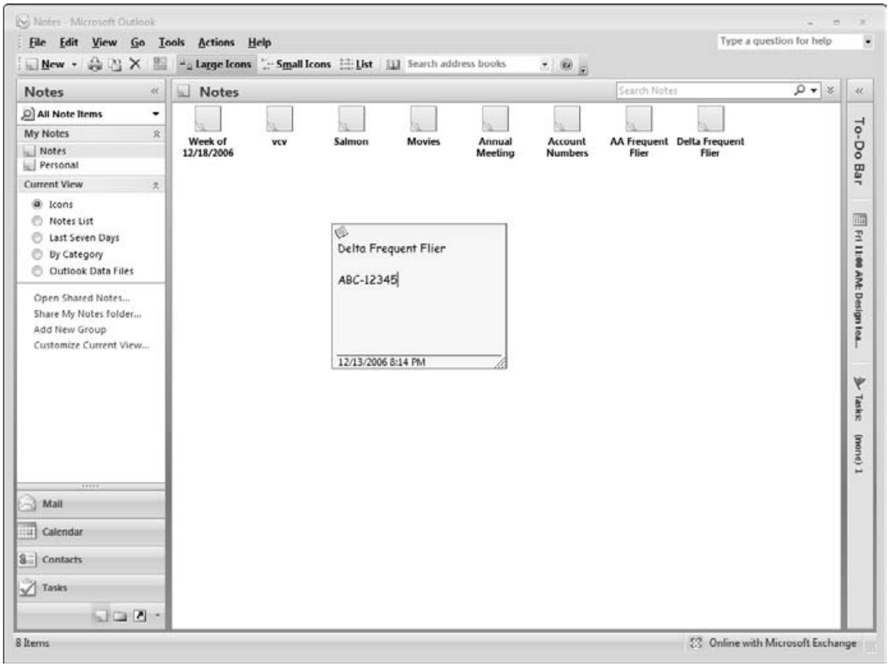
Notes are designed to be as easy as possible to use. They are not designed for storing large amounts of information or for organizing information in any sophisticated way. They can contain text only — no pictures or similar items — and do not permit any formatting. I use notes for things like:

- Airline frequent flier account numbers
- Descriptions of favorite restaurants
- Software installation keys
- A list of movies to see

Figure 13.1 shows an open note. The form is very simple and — aside from the content — contains only four elements:

FIGURE 13.1

An Outlook note.



- A close button (the X at the top-right corner) used to close the note
- A menu button (at the top-left corner) used to open a menu with note-related commands
- The time and date the note was created or last modified
- A handle (lower-right corner) used to change the size of the note form

Two features contribute to the ease of use of notes:

- You never have to save a note — they are always saved automatically by Outlook.
- You never have to name a note — the first line of the note is automatically used for the name.

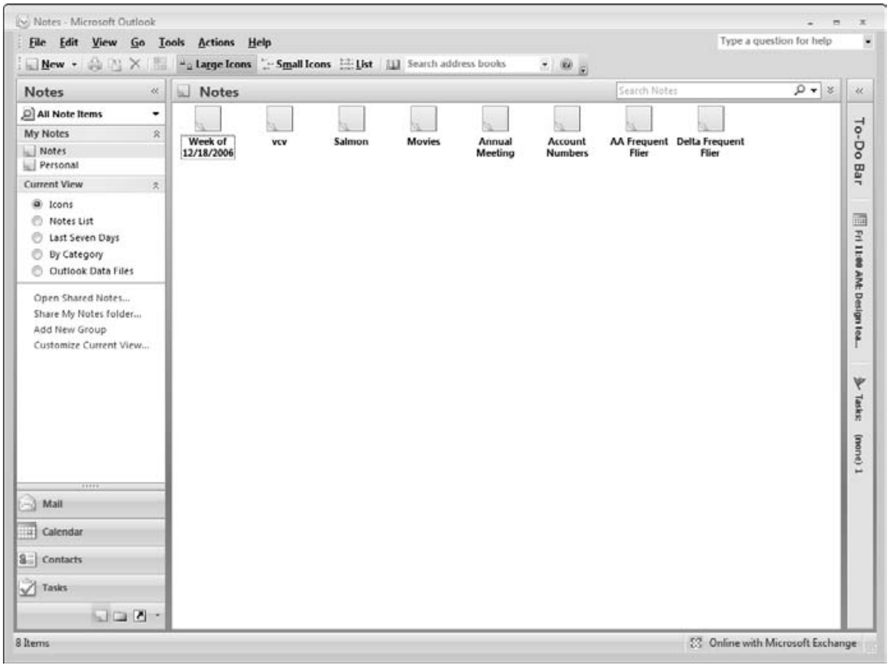
By default, Outlook displays notes as small icons with the title underneath, as shown in Figure 13.2. You can change the note view in various ways as described later in this chapter.

Notes and the Desktop

You can drag a note from Outlook and drop it on the Windows Desktop. The note will remain functional even when Outlook is not running. Such a note will display on the Desktop as well as in Outlook Notes view.

FIGURE 13.2

By default, Outlook displays notes as small icons with a title.



Creating a Note

You can create a new note in several ways:

- If Notes are displayed in Outlook, click the New button or press Ctrl+N.
- If some other view is displayed, display the New menu and select Note, or press Ctrl+Shift+N.

Outlook displays a new, blank note. All you need to do is type in the note title as the first line, hit Enter, and type the rest of the note. Then, click the note's close button or click anywhere outside the note to close and save it.

Opening and Editing a Note

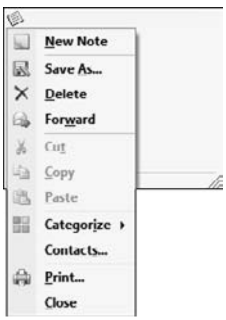
To open a note, double-click it. You can then edit the note and save your changes by closing the note. If you want to change the note's title, you must change the first line in the note.

When a note is open, you can take the following actions by clicking the menu icon in the top-left corner of the note and selecting from the menu (see Figure 13.3):

- **Save As:** Save the note as an RTF file. The original note is not affected.
- **Delete:** Delete the note.
- **Forward:** Creates a new email message with the note attached. You then address and send the message as usual.
- **Categorize:** Assign the note to an Outlook category or remove any previously assigned categories.
- **Contacts:** Associate one or more contacts with the note.
- **Print:** Print the note.

FIGURE 13.3

Using the Note menu.



Using Notes View

Outlook's Notes view displays your notes as icons with the note titles. You can change the way your notes are displayed and also perform various actions with notes from Notes view.

Changing Notes Display

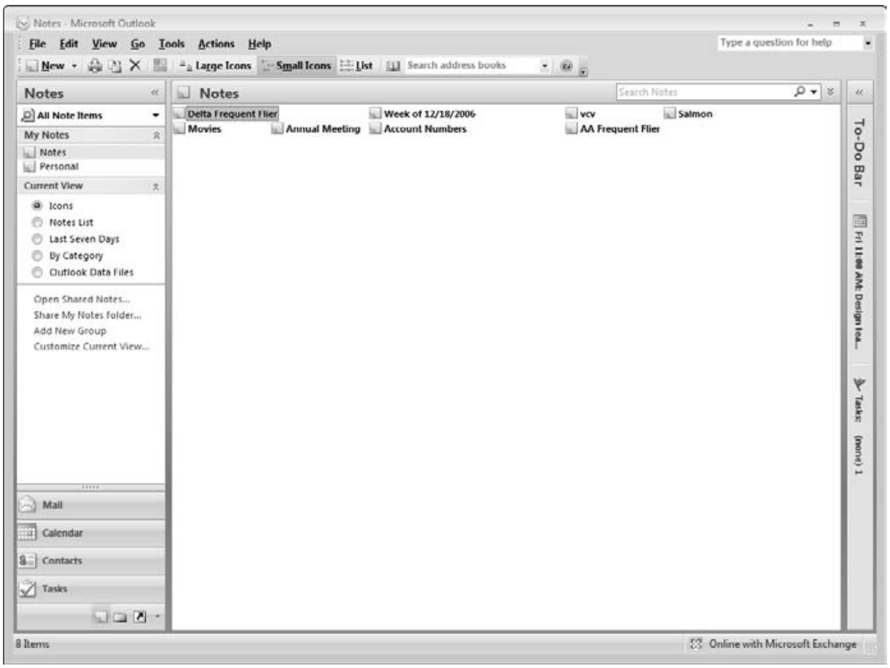
By default, notes are displayed as large icons with the note title underneath, as you saw earlier in Figure 13.2. Outlook provides two other Notes views, selected by clicking the Small Icons or List button on the toolbar:

- **Small Icons view** displays each note as a small icon with the title next to it, as shown in Figure 13.4.
- **List view** is similar to Small Icons view except that the notes and icons are displayed as a list (see Figure 13.5).

Whichever view you are using, you can customize it further by right-clicking a blank area in Notes view and selecting either Sort, Filter, or Other Settings from the context menu.

FIGURE 13.4

Notes displayed in Small Icons view.

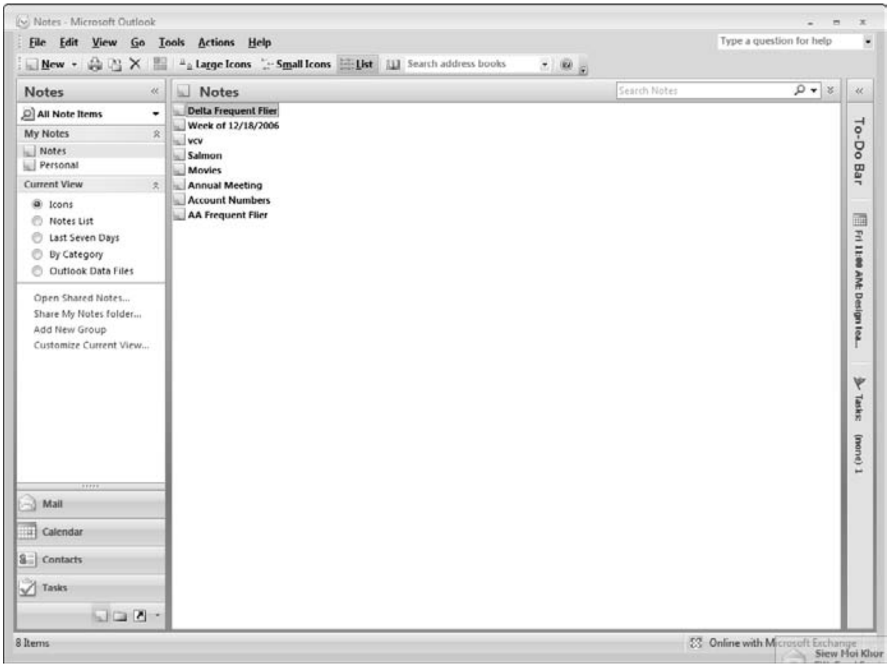


Finding the Icon Buttons

The Large Icons, Small Icons, and List buttons are available on the toolbar only when Icons is selected in the Current View list. This list, covered in the next section, makes some additional views available to you.

FIGURE 13.5

Notes displayed in List view.



If you select Sort, Outlook displays the dialog box shown in Figure 13.6. You can sort notes on as many as four fields. By default, they are sorted only by Subject (the title). You can sort in ascending or descending order by creation date/time, last modified date/time, contacts associated with the note, color (that is, category), and a few others. To specify how notes are sorted:

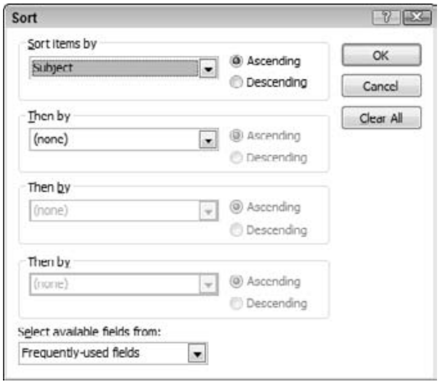
1. Select the primary sort field in the Sort Items By list.
2. Select either the Ascending or the Descending option.

3. If you want a secondary sort field for breaking ties in the primary field, select the secondary sort field in the top Then By list and select either the Ascending or the Descending option.
4. If desired, define a third and fourth sort field in the other Then By sections.
5. Click OK.

Sorting can be particularly useful when you have a lot of notes.

FIGURE 13.6

Specifying how notes should be sorted.



If you select Filter from the context menu, Outlook displays the Filter dialog box as shown in Figure 13.7. Only the Notes tab is relevant. To define a filter:

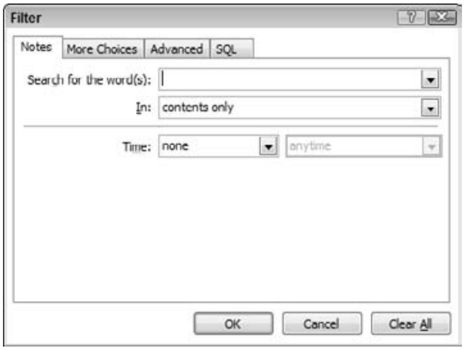
1. Enter one or more words of interest in the Search for the Word(s) field. Click the adjacent arrow to select from recently used search words.
2. Open the In list and select where Outlook should search. You can choose Contents Only (the entire note) or Subject Field Only (the note's first line).
3. If you want to filter by date/time, pull down the Time list and select Created or Modified. Then open the adjacent list and select your criterion (for example, yesterday, last week, and so on).
4. Click OK.

If you want to remove a filter from Notes view:

1. Open the Filter dialog box.
2. Click the Clear All button.
3. Click OK.

FIGURE 13.7

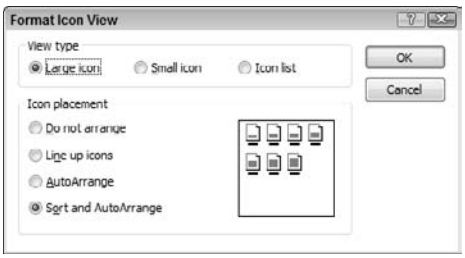
Defining a filter for Notes view.



The final command on the context menu, Other Options, brings up the dialog box shown in Figure 13.8. This dialog box lets you specify the kind of icon displayed for the notes and how they are arranged.

FIGURE 13.8

Setting other Notes view options.



Using the Current View List

You can select additional ways to display notes from the Current View list on the toolbar or the navigation pane. This is shown on the toolbar in Figure 13.9 and on the navigation pane in Figure 13.10. There are several predefined views on this list:

FIGURE 13.9

Selecting a view from the Current View list.

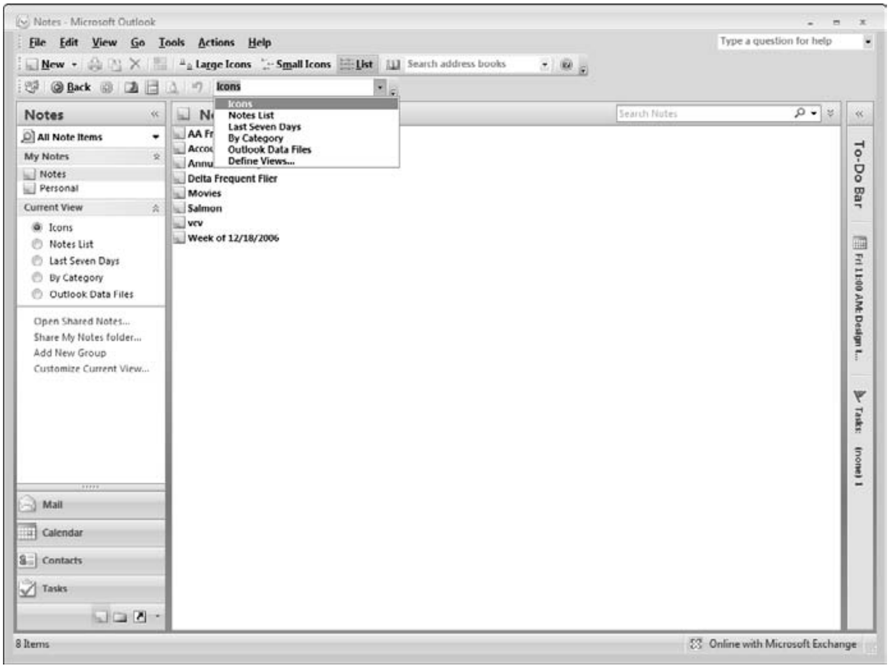
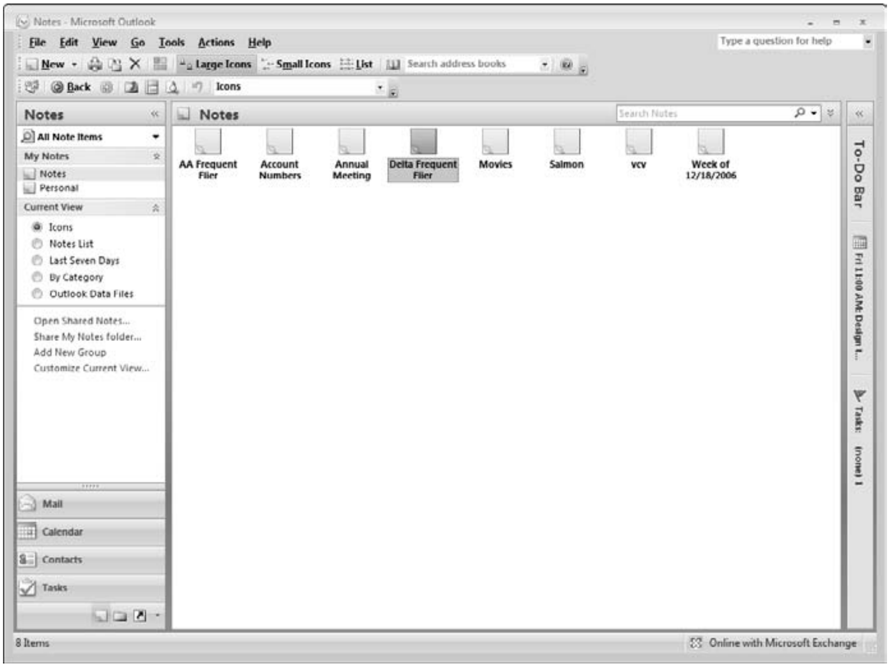


FIGURE 13.10

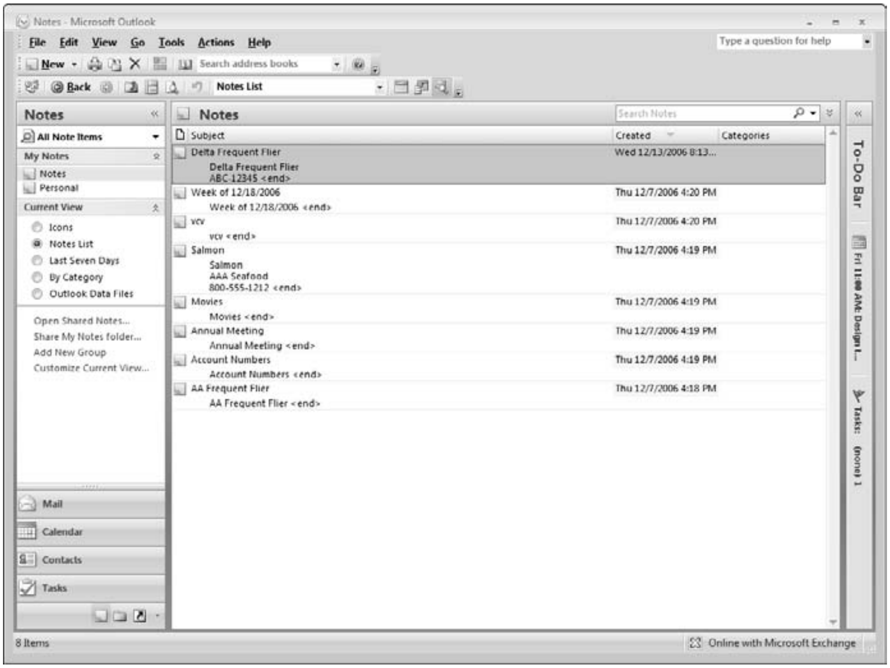
You can also select a view on the navigation pane.



- **Icons:** Lets you choose Large Icons, Small Icons, or List using toolbar buttons as was described in the previous section.
- **Notes List:** Displays a list of notes showing the title, content, and creation/modification date and time. This is shown in Figure 13.11.
- **Last Seven Days:** Displays only those notes that were created or modified within the past seven days. Uses the same display format as Notes List.
- **By Category:** Displays notes in list format organized by assigned category.
- **Outlook Data Files:** Displays notes in list format organized by Outlook data file. This is relevant only if you have two or more Outlook data files, a topic that is covered in Chapter 18.

FIGURE 13.11

Notes displayed in Notes List view.



The last item on the Current View list in the toolbar is Define Views. Selecting this command lets you define custom views for notes. This feature is explained in full in Chapter 19.

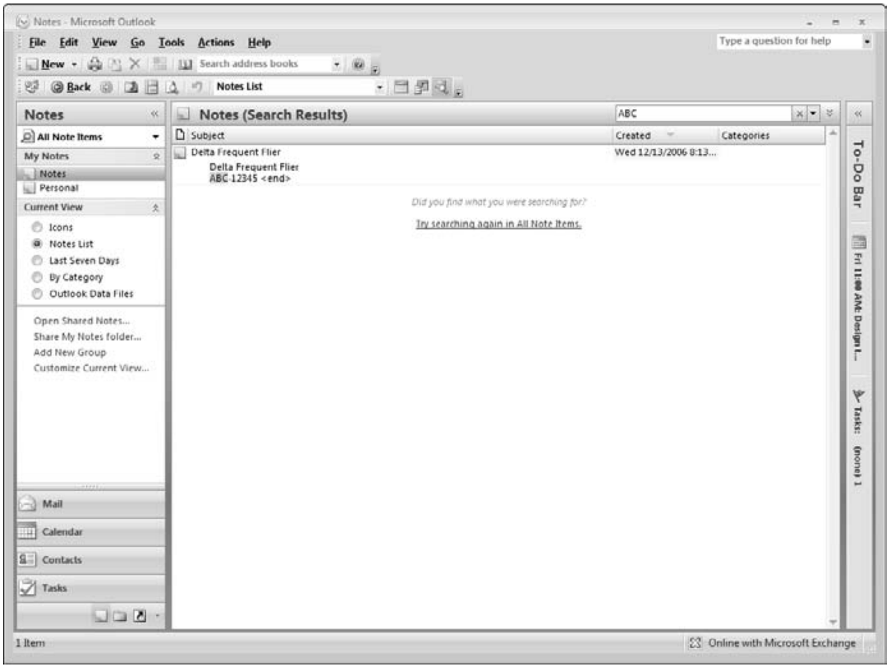
Searching Notes

As your collection of notes grows, you'll find it useful to be able to search your notes to find just the information that you are looking for. Searching is similar in some respects to defining a filter for Notes view, as was discussed in the previous section. It provides additional power and flexibility, however, and the two used together are even more powerful.

To perform a basic search that matches your search words to the content of the notes, type the search term into the search box (see Figure 13.12) or click the adjacent down arrow to select from previous searches. Outlook searches your notes and displays any notes that contain a match, with the search term highlighted, as shown in the figure. If you have a filter applied to your notes, the search will look only in notes that the filter displays.

FIGURE 13.12

Performing a simple Notes search.



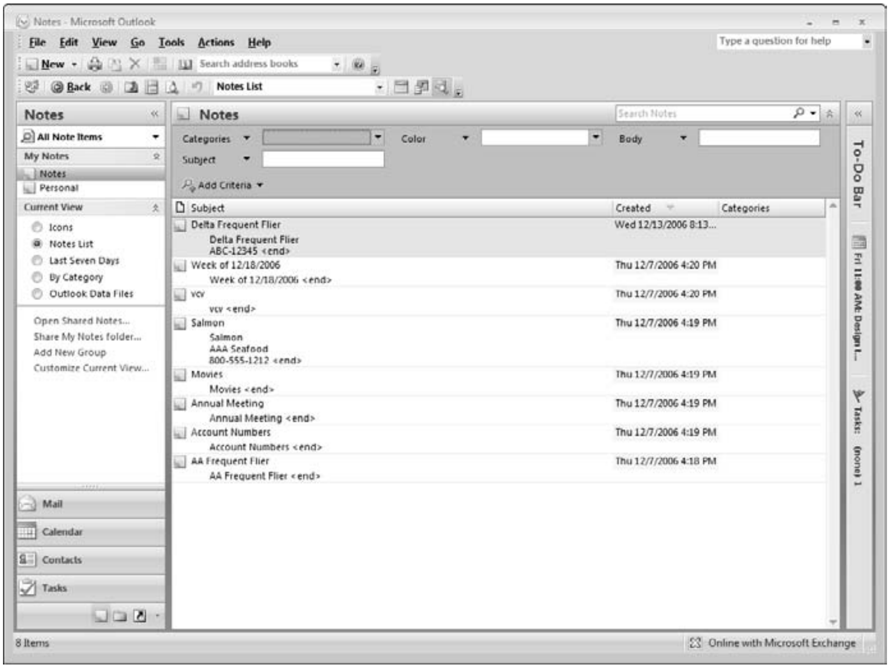
When you are done, click the X adjacent to the search box to delete the search term and return to display of all notes.

For a more advanced search, click the down arrow at the top right of the Notes window. Outlook expands the search panel to show more criteria fields, as shown in Figure 13.13. Four criteria fields are by default available: Categories, Color, Body, and Subject (or title). Enter your search term in the adjacent box, or select from the list, to search. You can also fine-tune your search as follows:

- Click the down arrow next to a field name to change to a different criterion. For example, you could change the Categories field to Created if you want to search based on note creation date/time.
- Click the Add Criteria button to add additional criteria to the search if you need more than four.
- Click the X next to the search box to clear all criteria and cancel the search.
- Click the up arrow to hide the advanced search fields.

FIGURE 13.13

Performing an advanced Notes search.



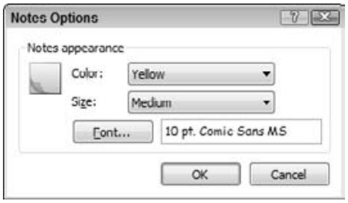
Setting Notes Options

Outlook has only a few general options for notes. They control the default color and size for notes and the font used to display them. You set these options in the Notes Options dialog box, shown in Figure 13.14. To open this dialog box:

1. Select Options from the Tools menu to open the Options dialog box.
2. If necessary, click the Preferences tab.
3. In the Contacts and Notes section, click the Note Options button.

FIGURE 13.14

Setting global options for notes.



The final option for notes determines whether the time stamp is displayed at the bottom of the note. By default this is turned on, but you can turn it off or back on as follows:

1. Select Options from the Tools menu to open the Options dialog box.
2. Click the Other tab.
3. Click the Advanced Options button to open the Advanced Options dialog box.
4. Click the When Viewing Notes, Show the Time and Date option.

Summary

Notes may be Outlook's simplest feature but they can be a very valuable tool. They provide an easy way to store and organize all those little bits of information that we all have to deal with. When combined with Outlook's categories and search tools, their usefulness becomes even greater.

Chapter 14

Using the Journal

IN THIS CHAPTER

About the Journal

Displaying Journal items

Creating Journal items automatically

Creating Journal items manually

Finding items in the Journal

Deciding what the Journal saves

Many people need to keep track of their time. You know that you spent eight hours at work today, but how much of that time was spent on which tasks? You may need this information for something specific such as client billing — or you may just want to know how you spend your time in order to work more efficiently. Outlook's Journal is designed for just this purpose.

Understanding the Journal

Fundamentally, the Journal is a log of how you spend your time. An individual Journal entry contains, at a minimum, the following information:

- A start date and time
- A duration
- An identification of the task: phone call, email, document, conversation, and so on
- Information linking the entry to a project, contact, or client company

Journal entries can be created two ways: automatically and manually. Outlook can automatically create Journal entries for certain activities that you carry out in Outlook, such as working on email messages and meeting requests. Outlook can also automatically create entries for activities that you perform in other Microsoft Office programs (Word, Excel, PowerPoint, Access, and Project).

Journal entries can also be created manually. This is useful for tracking tasks that Outlook cannot track automatically, such as working in non-Office programs or talking on the phone.

Using Journal View

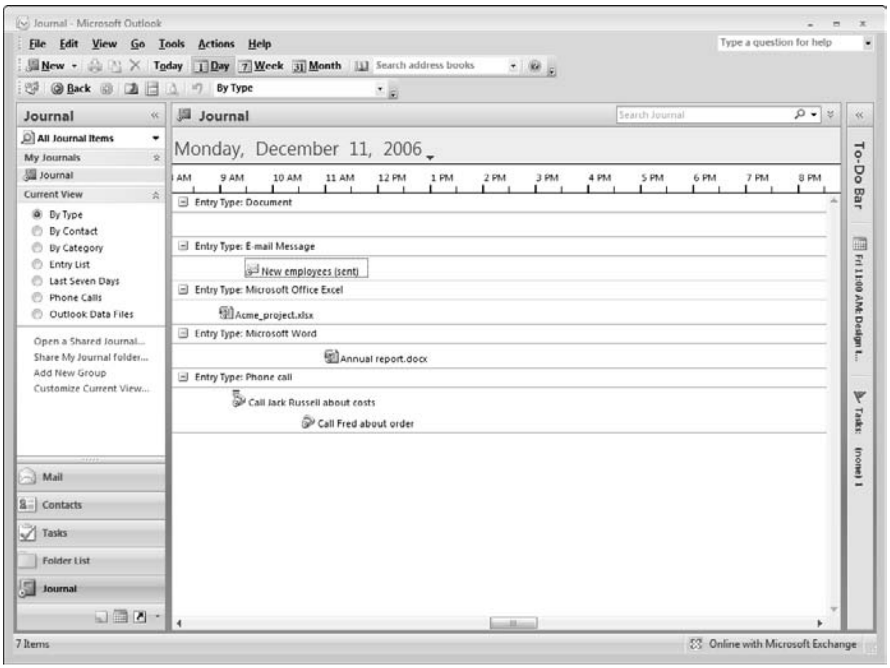
To view your Journal, select Journal from the Go menu or press Ctrl+8. The default Journal view lists entries by type — Word document, phone call, and so on. This is shown in Figure 14.1. You can see that:

- An automatic entry for an email message is listed by the message subject.
- An automatic entry for an Office document is listed by the document name.
- A manual entry — the two phone call entries in the figure — is listed by the subject that you assigned to the Journal entry.

In the By Type view, Journal entries are displayed on a timeline. In the figure, for example, you can see that the Journal entries for a single day — Monday, December 11 — are displayed with the hours of the day across the top of the display. You can scroll the display to bring earlier or later time periods into view using the horizontal scroll bar at the bottom of the Journal display. You can also display different time periods by clicking the Today, Day, Week, or Month button on the toolbar.

FIGURE 14.1

The default Journal view lists entries by type.



Create a Journal Button

By default, the Journal is not available from the navigation pane — that is, there is no Journal button displayed. You open the Journal by selecting Journal from the Go menu or by pressing Ctrl+8. You can add a Journal button to the navigation pane if you wish, as follows:

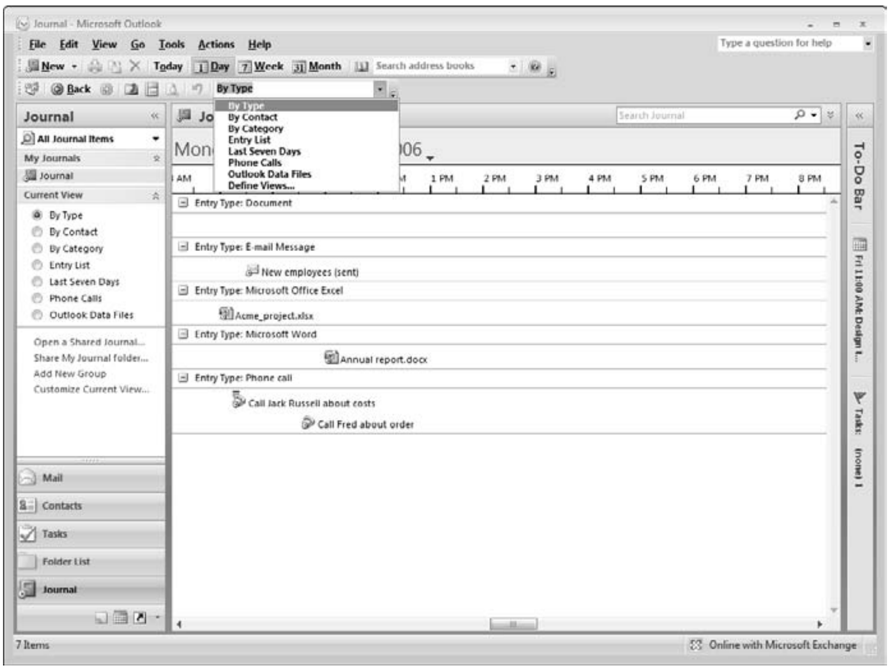
1. Click the down arrow at the bottom of the navigation pane.
2. Select Add or Remove Buttons from the menu.
3. Select Journal from the next menu.

Changing Journal View

Outlook offers several other ways for you to view your Journal entries. To switch views, you can use the Current View list on the toolbar, shown in Figure 14.2, or the Current View options on the navigation pane.

FIGURE 14.2

Selecting a Journal view from the toolbar.



By Contact View

When you select the By Contact view, Outlook organizes your Journal entries according to the contact that is associated with them. This is shown in Figure 14.3. Some entries may not have an associated contact, and they will be listed at the top.

Some Journal entries are associated with a contact automatically. For example, if you are tracking email messages in the Journal using the Automatic Tracking feature, each entry is associated with the recipient of the email message. You can also manually assign a contact to a Journal entry, as explained later in this chapter.

Entry List View

Entry List view provides a sortable list of all Journal entries, as shown in Figure 14.4. The type of each entry is indicated by the icon in the left column. You can sort the list on any column by clicking the column heading once (for ascending order) or twice (for descending order). The current sort column is marked by an arrow in the column heading (the Start column in the figure).

FIGURE 14.3

Viewing Journal entries by contact.

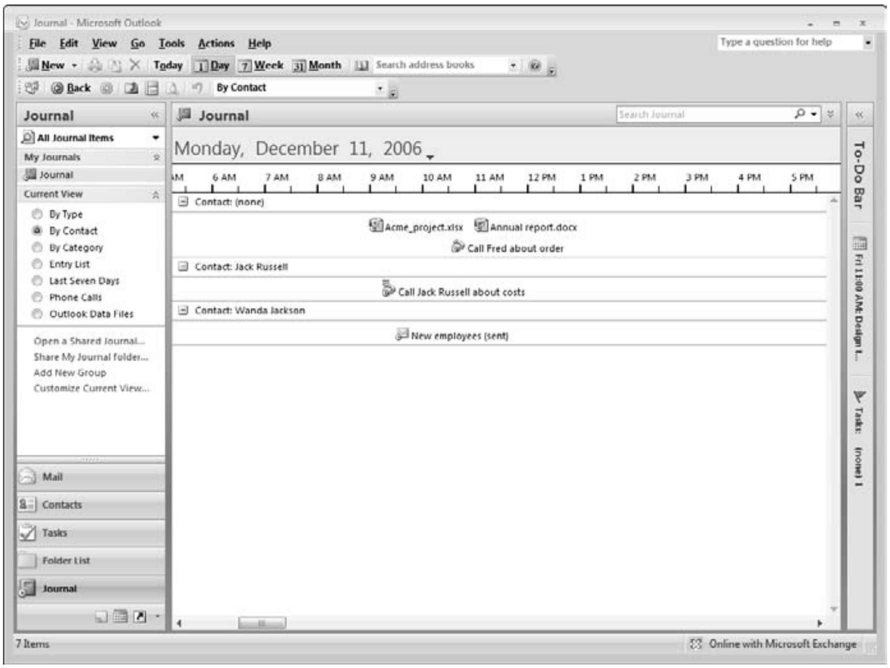
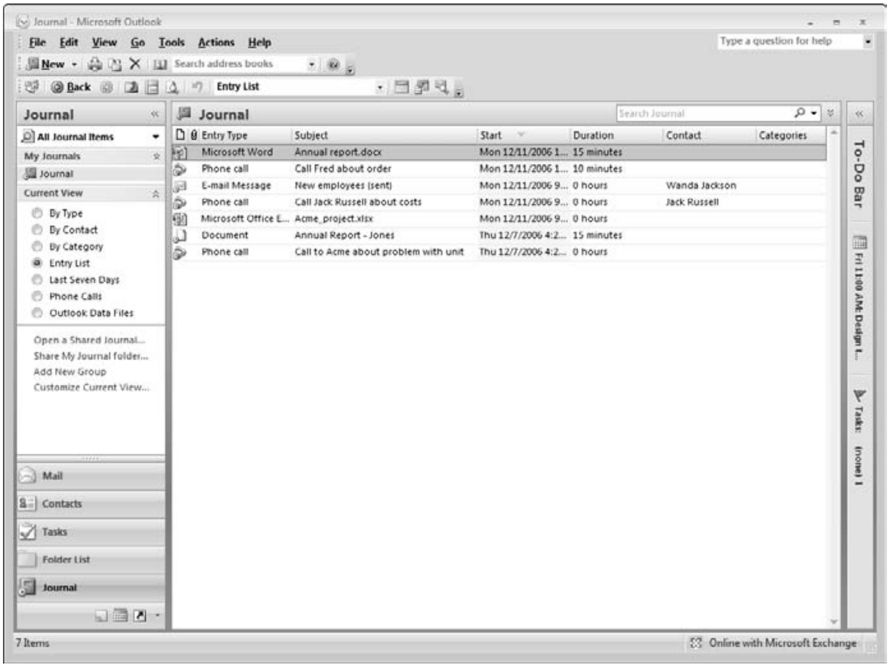


FIGURE 14.4

Viewing Journal entries as a list.



You can see that in Entry List view, some entries have an attachment icon (paper clip) displayed in the second column. This indicates that the entry has a document associated with it. For example, an automatic entry for a Word session will be associated with the document you worked on, and an entry for an email message will have the message linked to it. Other Journal entries, such as for a phone call, do not have an associated document.

Other Journal Views

There are several other Journal views you can select. They are explained briefly here:

- **By Category:** Organizes entries by the category (if any) they are assigned to.
- **Last Seven Days:** Displays only those entries for the past seven days.
- **Phone Calls:** Displays only entries of type phone call.
- **Outlook Data File:** Organizes entries by the Outlook data file they are in. This is relevant only if you have two or more Outlook data files.

Creating a Custom Journal View

On the Current View list on the toolbar, the last selection is Define Views. This command lets you define a custom view for whatever you are viewing — in this case, Journal entries. The process of defining a custom view is covered in Chapter 19.

Creating a Manual Journal Entry

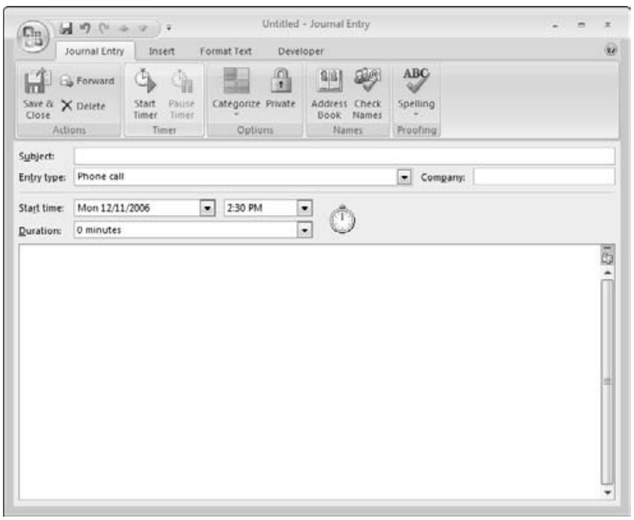
To keep track of activities that Outlook cannot track automatically, you must create a Journal entry manually. To create a new Journal entry manually:

- If you are currently in Journal view, click the New button or press Ctrl+N.
- If you are not in Journal view, click the arrow next to the New button and select Journal Entry from the menu, or press Ctrl+Shift+J.

Outlook opens a new, blank Journal entry form as shown in Figure 14.5. The current date and time are filled in, and the timer is stopped. Then:

FIGURE 14.5

Creating a new Journal entry manually.



1. Enter a subject for the Journal entry in the Subject field.
2. Select a type for the entry from the Entry Type pull-down list.
3. If desired, enter a company name in the Company field. If you have entered company names in previous Journal entries, you can click the adjacent arrow to select from a list of these names.
4. If desired, click the Contacts button to associate the entry with one or more contacts from your address book.
5. Optionally, click the Categorize button to assign a category to the entry.
6. Optionally, enter any notes in the large box in the middle of the form.

At this point, the Journal entry is almost complete. There are two ways you can use it. One is to time an event that you are about to start. For example, perhaps you are about to join a teleconference and want a Journal entry for your participation. Here's how to do this:

1. Click the Start Timer button. The stopwatch icon will become animated to show that the timer is running.
2. If there's a pause in your activity, click the Pause Timer button. When the activity resumes, click Start Timer again.
3. When the activity is completed, click Save & Close to stop the timer and save the entry.

The other way to create a Journal entry is for an activity that is already over. Perhaps Joe from Marketing came by your office and you talked about strategy for half an hour. Now you want to log that time in the Journal. Then:

1. Create the new Journal entry as described previously, but do not start the timer.
2. If necessary, change the start date by clicking the arrow next to the date field and selecting from the calendar that Outlook displays.
3. Click the arrow next to the time field and select a start time. They are listed in 30-minute increments. If you need a more precise time entry, for example 10:40, select a time that is close from the list and then edit the time in the field.
4. Click the arrow next to the Duration field and select the duration of the event. Again, if the precise duration is not listed you can edit the field directly.
5. Click Save & Close.

Sharing Your Journal

Like many other aspects of Outlook data, you can share your Journal with other people. This can be useful in various situations such as when you are part of a team working on a large project. Being able to view each others' Journals can help keep the project on track. Sharing Journal entries and other kinds of Outlook data is covered in Chapter 28.

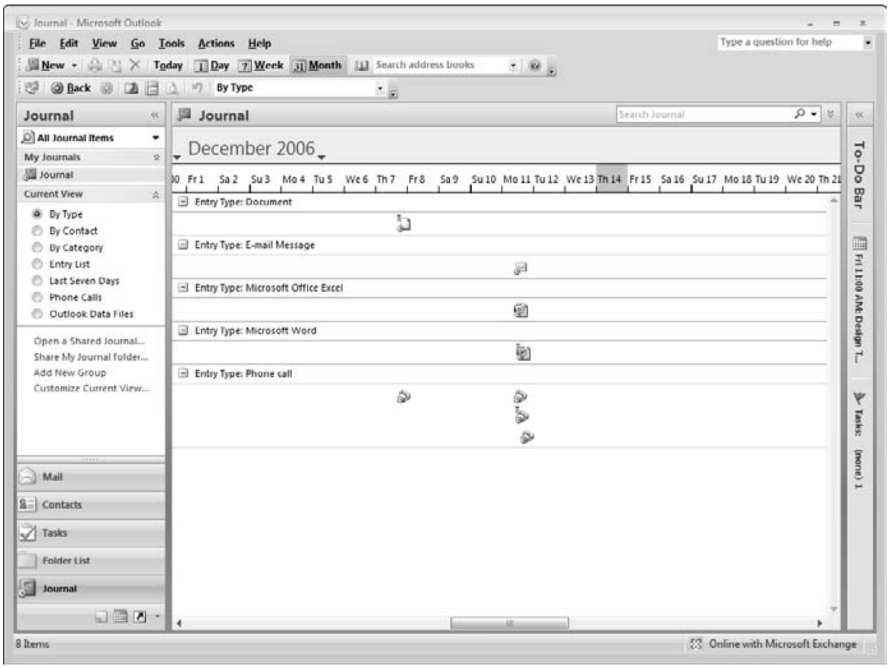
Searching the Journal

As you use the Journal, the number of entries will grow to the point where it's hard to find information by simply scrolling through it. You can use the Search feature to filter the Journal to show just the information you want. For example, you could filter to show only Journal entries where the Company field is "Acme Widgets" and the Start field is last month — enabling you to total the time spent on the Acme Widget project last month.

For a basic search, enter your search term in the Search Journal box at the top right of the Journal display (see Figure 14.6). You can also click the down arrow to select from previously used search terms. Outlook will automatically search as you enter the term and display only matching Journal entries (or a message if there are no matching entries). Click the X that is adjacent to the Search box to cancel the search and return to displaying all Journal items.

FIGURE 14.6

Performing a basic search of the Journal.

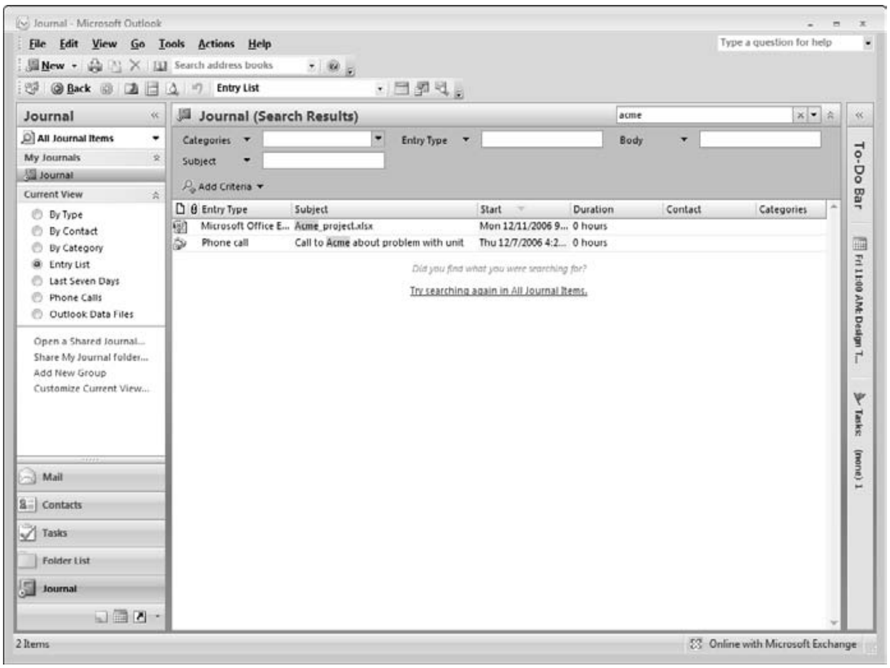


If you need more control over the search, click the double down arrow at the top-right corner of the Journal display. Outlook displays additional criterion fields as shown in Figure 14.7. Each field lets you enter a search term or select from a drop-down list. As you make entries, the Journal display is automatically filtered to show only matching entries. You can also take the following actions:

- To change a displayed criterion field — for example, from Categories to Start — click the arrow adjacent to the field name and select from the list that is displayed.
- To remove a criterion field, click the arrow adjacent to the field name and select Remove.
- To add a new criterion field, click Add Criteria and select from the list.
- To cancel the search and display all Journal entries, click the X to the right of the Search Journal box.
- To hide the additional criterion fields, click the double up arrow at the top-right corner of the Journal display.

FIGURE 14.7

Performing an advanced search of the Journal.



Specifying What's Saved in Journal Entries

Outlook's automatic Journal entry feature can be useful, but you may not want it to save everything you do. You can customize Outlook to specify precisely which types of items are automatically saved as Journal entries. Here's how:

1. Select Options from the Tools menu to display the Options dialog box.
2. If necessary, click the Preferences tab.
3. In the Contacts and Notes section, click the Journal Options button to open the Journal Options dialog box (see Figure 14.8).
4. In the Automatically Record These Items list, place a checkmark next to the Outlook items for which you want automatic Journal entries created.
5. In the For These Contacts list, place a checkmark next to the contacts for which you want automatic Journal entries created.
6. In the Also Record Files From list, place a checkmark next to the Microsoft Office applications for which you want automatic Journal entries created.
7. Click OK twice to close all dialog boxes.

FIGURE 14.8

Setting Journal options.

There are two other elements in the Journal Options dialog box. One option determines what happens when you double-click a Journal entry that has a file associated with it, such as an email message or a Word document. You can choose to open either the Journal entry itself or the linked document.

Finally, the AutoArchive Journal Entries button lets you set AutoArchive options. These options are covered in Chapter 18.

Summary

Outlook's Journal lets you keep track of the time you spend on various activities. Some activities, such as working on email messages and Microsoft Office documents, can be tracked automatically. Other activities can be tracked manually. You can choose between several Journal displays to view the information in the way you need. You can also use the powerful search tool to narrow the Journal display to show only the entries of interest. The Journal is a useful tool for keeping track of and managing your time.

Chapter 15

Keeping Track of Tasks

IN THIS CHAPTER

In today's busy world, few of us have any shortage of things to do. There always seems to be a list of tasks waiting for our attention. Particularly in a high-pressure business or professional environment, it can be very important to keep track of your tasks so that you can organize your time efficiently. Outlook's Task feature is a powerful tool that can greatly simplify this.

Understanding Tasks

A *task* is similar to an appointment in that it is something you must attend to. It is different in that it does not have a specific date or time associated with it, although it may well have a due date by which it is supposed to be completed. In this sense, Outlook tasks are pretty much like a paper to-do list that you stick on the fridge. When you look a little deeper, however, you'll find they can do so much more:

- You can be reminded of a task at a specified time and date.
- You can specify different priorities for different tasks.
- You can assign a task to someone else and send them a message with the required information.
- You can assign a status to a task (not started, in progress, and so on) as well as a percent completed value.
- You can send a status report on a task to other people.

I find that Outlook's Task feature is something I use all the time.

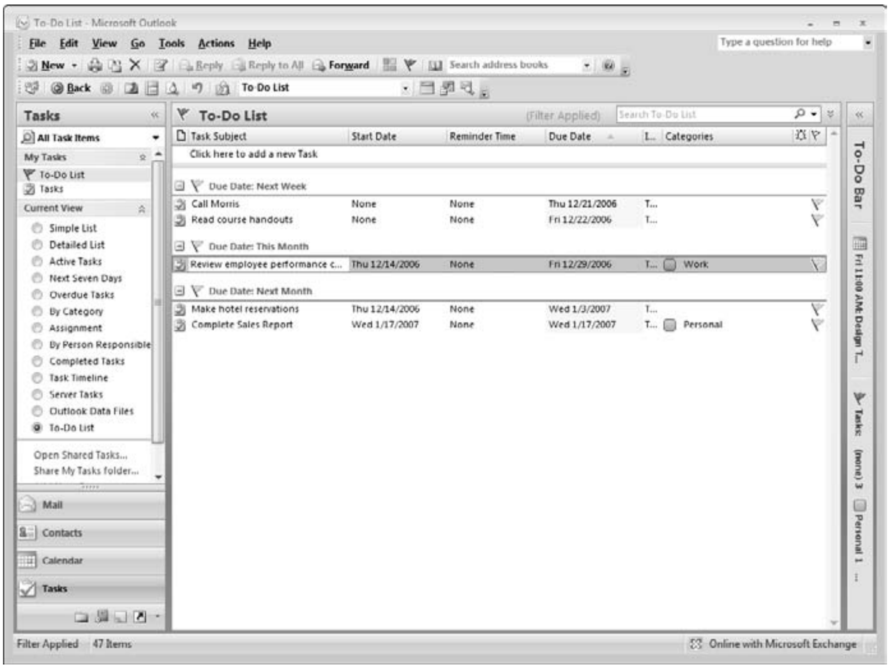
Using the Task View

To switch to Task view in Outlook, click the Tasks button in the navigation pane or select Tasks from the Go menu. The default Tasks view is shown in Figure 15.1. This view shows active tasks — those not yet completed. They are arranged by due date initially, although you can change the sort order by clicking the column headings (To-Do Title, Status, and so on) at the top of the list.

Strictly speaking, the display shown in Figure 15.1 is the *To-Do List* — that is, uncompleted tasks. If you want to display all tasks, including completed ones, click the Tasks item under My Tasks in the navigation pane (see Figure 15.2). This view shows all tasks, with completed ones displayed at the bottom and crossed out.

FIGURE 15.1

The default Tasks view displays a list of all your active tasks.



No Due Date?

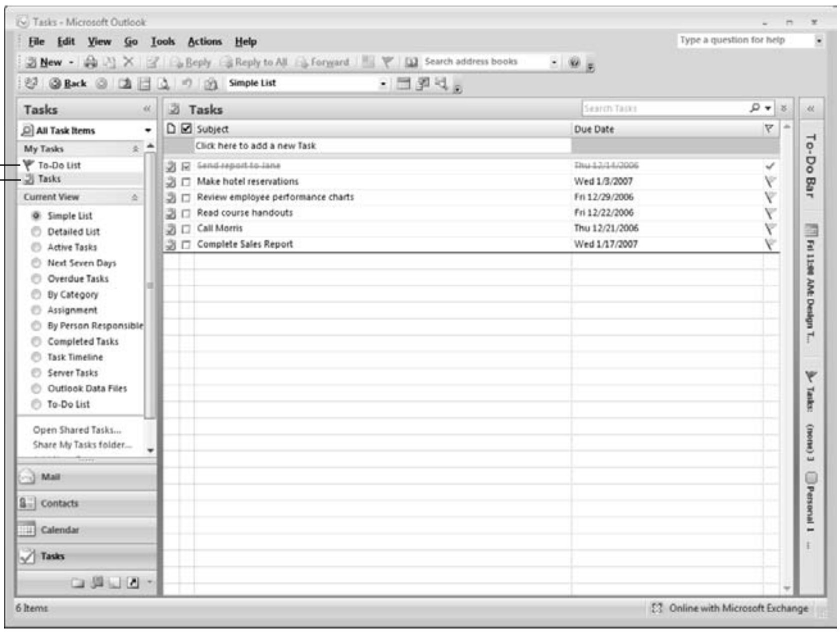
Though most tasks have a due date, it is not required. Tasks that do not have a due date are displayed in their own section, No Due Date, when tasks are organized by due date.

FIGURE 15.2

You can also display all tasks, including completed ones.

View all tasks

View active tasks



While you are viewing tasks, you can open a single task by double-clicking it. You can also perform certain actions with the task by right-clicking it and selecting from the context menu. These actions are

- Mark a task as complete
- Assign the task to someone
- Add a follow-up to the task
- Assign a category to the task

You learn more about these actions later in the chapter when I show you how to create a new task.

Outlook provides you with several other ways to view your tasks. You can switch to a different view by selecting the desired view in the navigation pane. The views are:

- **Simple List:** A list of all tasks including completed ones (same as clicking Tasks as described earlier).
- **Detailed List:** Similar to Simple List but with more details about each task.
- **Active Tasks:** Tasks not marked as completed.
- **Next Seven Days:** Tasks due within the next seven days.
- **Overdue Tasks:** Tasks whose due date has passed but are not marked as completed.
- **By Category:** All tasks organized by assigned category.
- **Assignment:** Tasks organized by the person they are assigned to.
- **By Person Responsible:** Tasks organized by owner (the person who created the task).
- **Completed Tasks:** Tasks that have been marked as completed.
- **Task Timeline:** Displays tasks arranged on a timeline according to due date.
- **Outlook Data Files:** Displays tasks organized by the Outlook data file they are in. This is relevant only if you have more than one Personal Folders file.
- **To-Do List:** Displays active tasks in a simplified, easy-to-use format. See the section "To-Do List View," later in this Chapter, for more details.

Task Timeline View

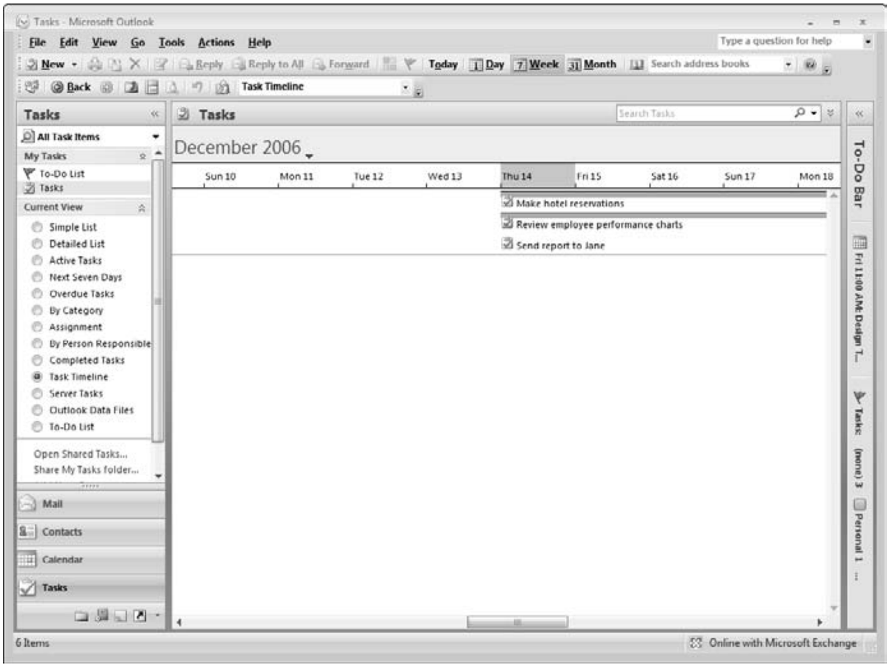
Task Timeline view arranges tasks on a timeline according to their due date, as shown in Figure 15.3. This visual representation can be useful for finding time periods when a lot of tasks are due, or for locating relatively free periods on your schedule.

What About Start Dates?

A task can have a start date assigned to it as well as a due date. A start date can be useful when there is a reason that you cannot start a task before that date. When displayed in Timeline view, a task with a start date is displayed at the start date with a line extending to the due date.

FIGURE 15.3

Tasks displayed on a timeline.



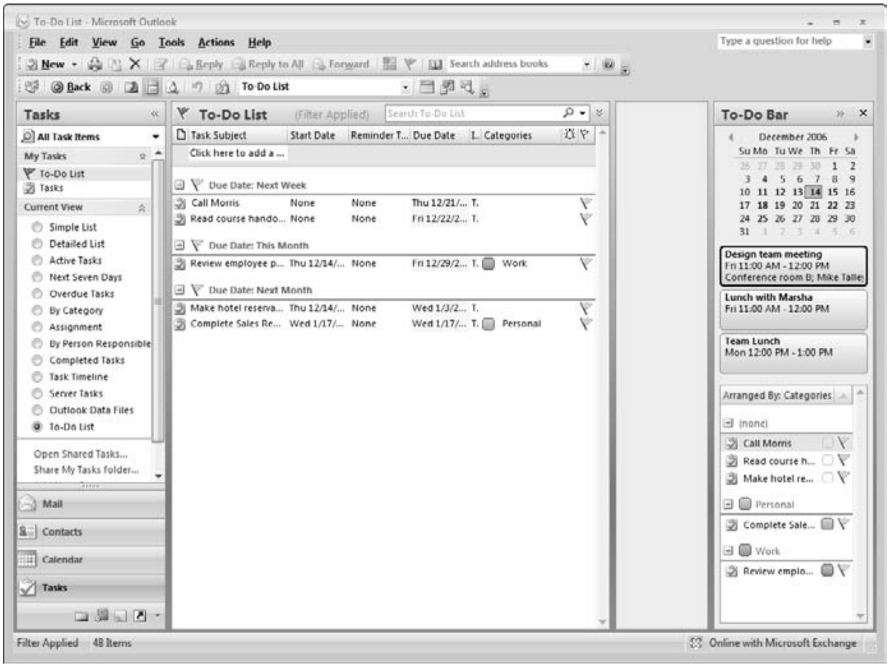
In the figure, the Task Timeline view is displaying a week, with the days listed across the top of the display. You can switch between day, week, and month views by clicking the corresponding button on the toolbar. You can also quickly scroll to today by clicking the Today button. To scroll forward and backward in time, use the horizontal scroll bar at the bottom of the window.

To-Do List View

The To-Do List view displays a simplified list of active tasks. It is not the same thing as the To-Do Bar, which is covered later in the chapter. The To-Do List is shown in Figure 15.4. In the figure, the tasks are arranged by due date, as indicated by the heading at the top of the list. Click this heading to arrange the tasks by other fields such as Category or Importance.

FIGURE 15.4

Viewing the To-Do List.



At the top of the To-Do List is a box labeled Click here to add. You can click here and type a new task title. When you press Enter, the task is automatically created with a due date of today and default settings for other task data such as importance. Double-click the newly created task to change the due date or any other aspects of the task.

Creating a New Task

To create a new task, click the New button when you are in Task view, or select Task from the New menu when in any other view (you can also press Ctrl+Shift+K). Outlook will create a new task and display it as shown in Figure 15.5.

The only required entry on this form is the subject, which will be the title of the task displayed in Task view. The other task information on this form is explained here and in the following sections:

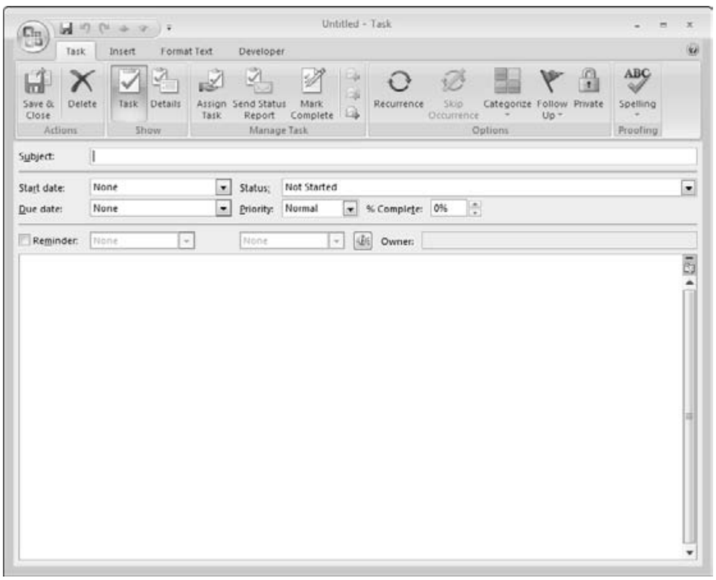
- **Start Date:** If you want to specify a start date for the task, click the adjacent down arrow and select the date from the calendar.
- **Due Date:** Click the adjacent down arrow and select the task's due date from the calendar.

- **Status:** By default this is Not Started. If necessary, you can open this list and select In Progress, Completed, Waiting on Someone Else, or Deferred.
- **Priority:** The default is Normal; you can also select Low or High.
- **% Complete:** If the task is already partially complete, use the up and down arrows to specify the correct value in this field.
- **Categorize:** Click this button to assign the task to an Outlook category.
- **Follow Up:** Click this button to assign a follow-up to the task.
- **Private:** Click this button to make the task private so it will not be viewable by other people when you share your calendar.
- **Reminder:** Check this option if you want to be reminded of the task, then use the adjacent fields to specify the date and time of the reminder. Click the speaker icon to change the sound played at the reminder time.
- **Contacts:** Click this button to associate the task with one or more of your contacts.
- **Save & Close:** Click this button when you are finished defining the task.

Other aspects of creating a new task are explained in the following sections.

FIGURE 15.5

Creating a new task.

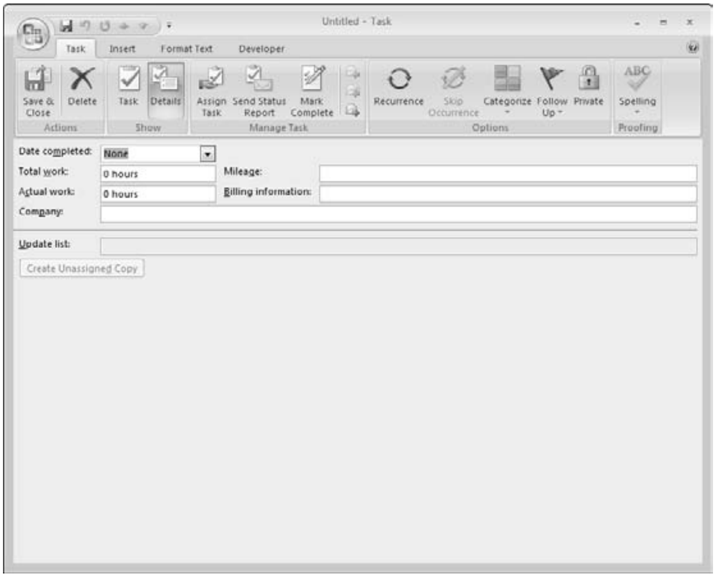


Entering Task Details

If you click the Details button in the Show section of the ribbon, Outlook displays the Details window for the task. This window is shown in Figure 15.6.

FIGURE 15.6

Entering details for a new task.



The fields available in the Details window let you keep track of additional information related to a task. You can specify the completion date, enter information about the time spent on the task, identify a company associated with the task, track mileage, and enter billing information. Outlook does not track this information for you, but just provides these detail fields for you to enter it in.

The lower section of the Details window is relevant only if the task has been assigned to someone and is explained in the next section.

When you have finished entering details for the task, click the Task button on the ribbon to return to the regular task window. You can also click Save & Close if you have finished defining the task.

Assigning a Task

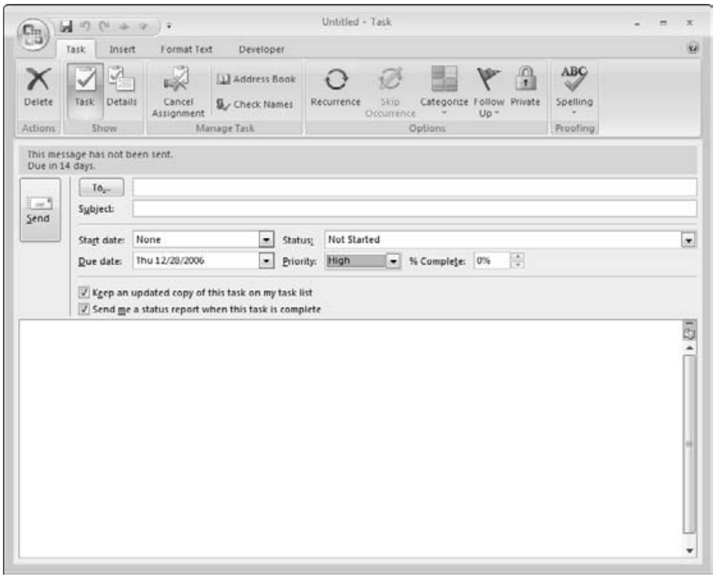
Outlook lets you assign a task to someone else. This can be useful in a variety of situations such as when you are heading a committee and need to delegate various jobs to the committee members. By using Outlook's Assign Task command you can track progress and be notified when each task has been completed.

To assign a task, create the task as described earlier in this chapter. You can also open an existing task and, as long as you are the owner of the task, assign it to someone else. Here's how:

1. Click the Assign Task button on the ribbon. Outlook displays the form shown in Figure 15.7. This is actually just the regular task form with a few extra elements.
2. In the To field, enter the email address of the person you are assigning the task. You can also click the To button and select from your contacts.
3. Enter additional information about the task, such as subject and due date, if it has not already been entered.
4. Check or uncheck the two available options (explained next).
5. Click the Send button.

FIGURE 15.7

Assigning a task to someone.



There are two options available when you assign a task to someone. They are

- **Keep an Updated Copy of This Task on My Task List:** If this option is selected, you will receive automatic updates when the person whom you assign the task to updates its status.
- **Send Me a Status Report When This Task Is Complete:** If this option is selected, you will receive an automatic notification when the person whom you assign the task to marks it as completed.

When you send a task assignment, the recipient receives an email message containing information about the assignment and permitting them to either accept or decline the assignment. You learn more about this and other aspects of task assignments later in this chapter in the section "Working with Assigned Tasks."

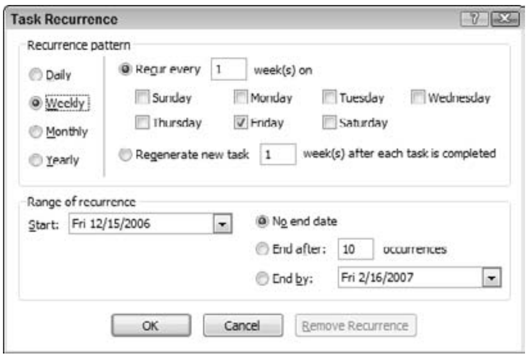
Specifying Task Recurrence

Like appointments, a task can have a defined recurrence. For example, you may have to review each month's sales figures by the end of the next month. Rather than entering a new task each month, you can define a task that recurs each month.

To define a recurring task, create the task as usual and before saving and closing it click the Recurrence button on the ribbon. Outlook opens the Task Recurrence dialog box as shown in Figure 15.8.

FIGURE 15.8

Defining a recurring task.



You can see that there are four basic patterns of recurrence: Daily, Weekly, Monthly, and Yearly. When you choose the basic pattern in the top left of the dialog box, the remainder of the options will change to reflect what's available:

- **Daily:** You can choose every so many days or every weekday.
- **Weekly:** You specify how often (every week, every two weeks, and so on) and the day or days of the week.
- **Monthly:** You specify which day of the month, either as a number (the 25th of each month, for example) or a day of the week (the first Thursday, for example).
- **Yearly:** You specify a specific date (June 12, for example) or a day of a month (the first Monday in June, for example).

In all cases, you also specify a start date and when the recurring tasks will end.

Assigning Recurring Tasks

When you assign a recurring task, a copy of the task will remain in your task list but cannot be updated automatically. However, if you requested a status report when the task is complete, you will receive a status report for each occurrence of the task that is completed.

Working with Assigned Tasks

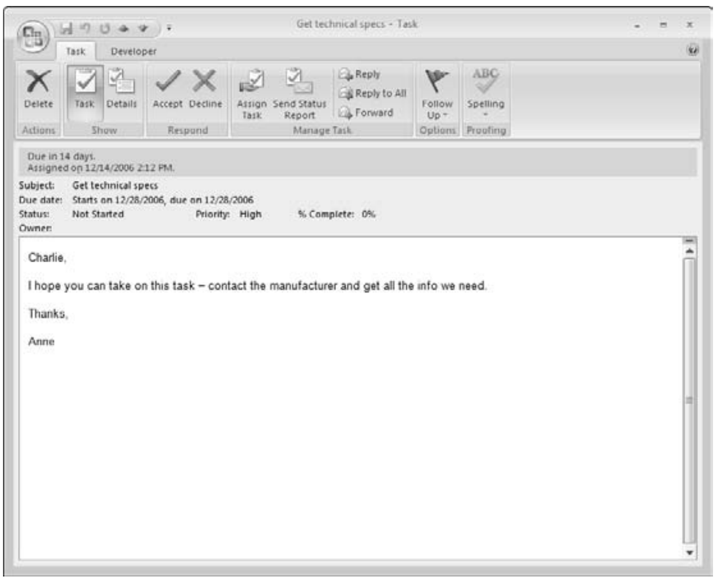
Working with assigned tasks, whether you are the person doing the assigning or the person accepting the assignment, can be a bit confusing. Once you understand it, however, I think you'll find the tool very useful.

Receiving a Task Assignment

When someone sends you a task assignment, you receive an email that looks as shown in Figure 15.9. There are three buttons of importance on the ribbon:

FIGURE 15.9

Receiving a task assignment from someone else.



- **Accept:** Accepts the assignment, adds it to your task list, and notifies the person who sent you the assignment that you have accepted.
- **Decline:** Declines the assignment and notifies the person who sent you the assignment that you have declined.
- **Assign Task:** Lets you assign the task to a third person who will receive the same notification and can accept, decline, or assign the task to yet another person. The person who originally assigned the task to you will be notified of the reassignment.

Receiving Accept/Decline Notifications

When you send a task assignment to someone, one of three things will happen (assuming that the assignment is not simply ignored!):

- First, the person may accept the task. You'll receive a message to that effect, and the task will automatically be updated to reflect that the task was accepted and is now owned by that person.
- Second, the person may decline the task. You'll receive an email notification. When you open this email you can take one of two actions by clicking the corresponding button on the toolbar:
  - **Return the Task to Your Task List:** You regain ownership of the task.
  - **Assign Task:** Assign the task to someone else.
- Finally, the person you assigned the task to may assign it to someone else. That person can accept, decline, or reassign the task.

About Task Ownership

A task has, at any given moment, one and only one owner. Owning a task means that you can assign it to someone else. Here's how ownership works:

- When you create a task, you are the original owner.
- When you assign the task to someone, they become the temporary owner.
- The person who receives the assignment can do one of three things: (1) Accept the task and become the owner, (2) Decline the task and return ownership to you, or (3) Assign the task to a third person who then becomes the temporary owner.

If you assign a task to someone and that person declines, ownership passes back to you only when you reclaim ownership by returning the task to your task list — it does not happen automatically.

Assigning a Task to Multiple People

Though Outlook does not prevent you from assigning a task to two or more people, you cannot keep an updated copy of the task in your task list. For this reason, it is better to divide a multi-person task into parts and assign each part, as a separate task, to an individual person.

Task Status Reports

When you have accepted a task assignment, you own that task, and no one but you can change the task even though it may be on their task list. You can then, as you work on the task, open it and update the status and percentage completed of the task and you can also mark it as completed. When you do so, and save the modified task, an update will be sent to the person who assigned you the task (assuming that the Keep an Updated Copy of This Task on My Task List option was selected when you were sent the assignment). By default, this update will not appear in the task assigner's Inbox but will be processed automatically and the updated information will be available the next time they view the task.

Likewise, if the Send Me a Status Report When This Task Is Complete option was selected when you were sent the assignment, the person who assigned the task will receive an automatic update when you mark the task as complete. While task complete updates are processed automatically, they will appear in the person's Inbox.

A task can have more than one prior owner. Suppose, for example, that person A created the task and sent a task request to person B. Then, person B sent a task request to person C, who accepted the task. C is the owner of the task and both A and B are prior owners and will receive status updates.

Sending a Status Report Manually

There may be times when you want to manually send a status report or comments about a task. There are two situations when this might be desirable:

- The original task request (when you were assigned the task) did not include a request for automatic status updates.
- You were not assigned the task — it is simply a task that you created but want to keep other people updated about.

To do so, open the task and click the Send Status Report button. Outlook creates an email message with information about the task status in the body of the message. You can add text as needed. If the task was assigned to you, the To field will already contain the addresses of the task's prior owners. You can add additional recipients if desired.

Other Ways of Viewing Tasks

The most flexible way to view your tasks is using Task view, as explained earlier in this chapter. You can also have Outlook display tasks on the To-Do Bar and in Calendar view.

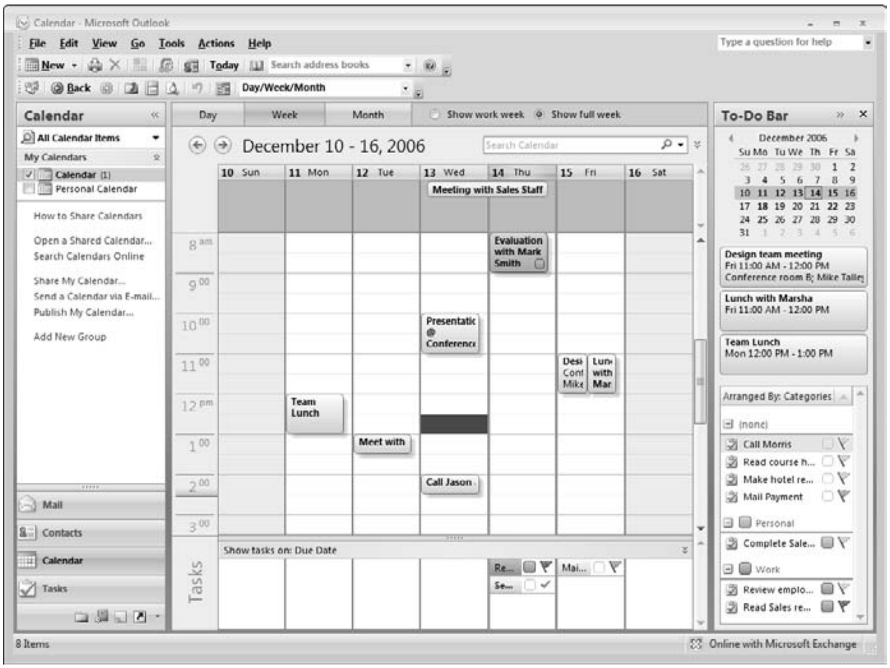
Viewing Tasks on the To-Do Bar

You can display active tasks on the To-Do Bar along with the Date Navigator and upcoming appointments. They are displayed at the bottom as shown in Figure 15.10.

If you do not see your tasks on the To-Do Bar, you may need to change the To-Do Bar display by right-clicking it and then selecting Task List from the context menu.

FIGURE 15.10

Viewing the daily task list on the To-Do Bar.



Viewing Tasks on the Calendar

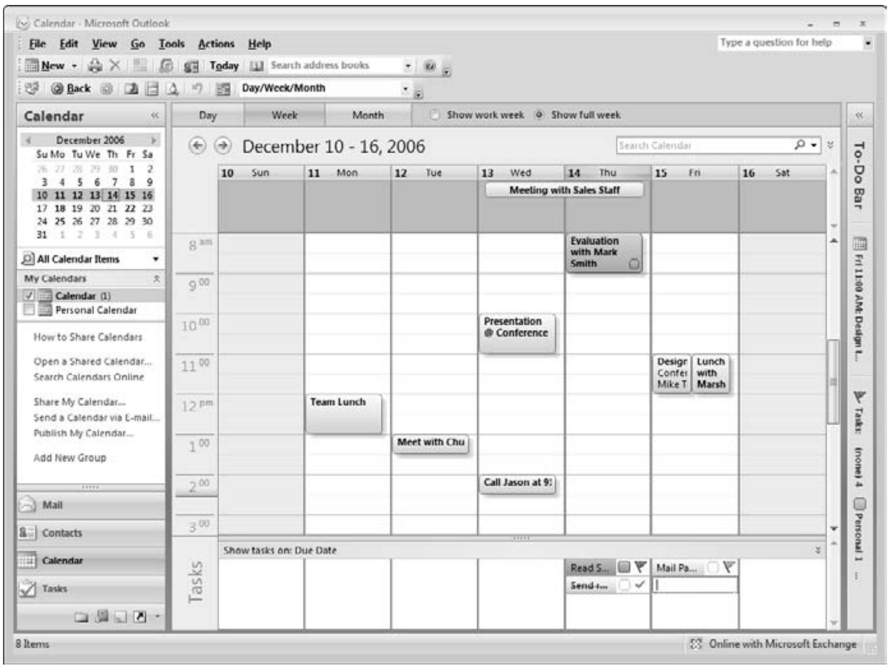
The Outlook Calendar can display the daily task list along with your appointments. The daily task list is displayed below the appointment section of the Calendar as shown in Figure 15.11. You have three options as to how the daily task list is displayed:

- **Normal**, as shown in the figure, with task subjects, categories, and follow-up flags.
- **Minimized**, which displays the number of active tasks for the displayed time period without any details.
- **Off**, which does not display the list.

To switch between daily task list views, display the Outlook Calendar, choose Daily Task List from the View menu, and then select the desired view from the next menu. This menu also lets you specify whether to display tasks by due date (the default) or start date, and whether to show completed tasks.

FIGURE 15.11

Viewing the daily task list on the Outlook Calendar.

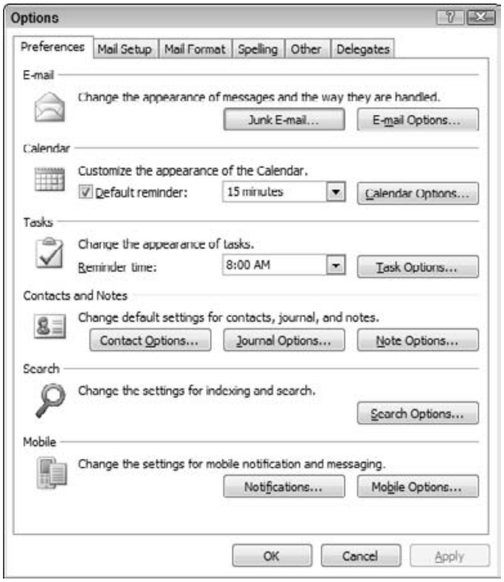


Setting Task Options

Outlook offers several options that relate to the way tasks and task assignments work. To view and change these options, select Options from the Tools menu to display the Options dialog box. One task option is located on the Preferences tab, as shown in Figure 15.12. It specifies what time of day a reminder is displayed for a task that is due today (only for tasks with a reminder set, of course).

FIGURE 15.12

The Task Options section of the Preferences tab in the Options dialog box.

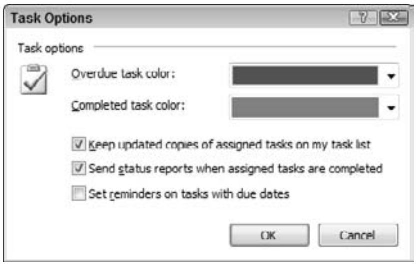


The other task options are accessed by clicking the Task Options button on the Preferences tab to open the Task Options dialog box, shown in Figure 15.13. The first two options determine the colors used to display overdue tasks and completed tasks — the default colors are red and dark gray, respectively. The other options are

- **Keep Updated Copies...:** If selected, Outlook maintains updated copies of tasks you have assigned on your task list.
- **Send Status Reports...:** If selected, Outlook automatically sends a status report when you mark as completed a task that you have been assigned.
- **Set Reminders...:** If selected, Outlook automatically sets a reminder for all tasks that you create with a due date.

FIGURE 15.13

The Task Options dialog box.



Summary

Outlook provides some powerful tools for keeping track of your tasks. Though a task does not have a specific period of time associated with it (unlike an appointment), it can have a due date. By listing your tasks and optionally reminding you of when they are due, Outlook can greatly reduce the chance that you'll forget to do something important. Outlook even lets you assign tasks to other people and track their progress, a really valuable tool for a manager or team leader.

Chapter 16

Making Use of RSS Feeds

RSS stands for *Really Simple Syndication*, a family of web feed formats that are used to deliver content over the Internet. The term *syndication* refers to the fact that you subscribe to one or more specific feeds and your software — Outlook in this case — automatically receives the files and displays the information they contain. You can subscribe to RSS feeds on just about any topic you can imagine — news, sports, finance, weather...you name it.

IN THIS CHAPTER

Understanding RSS

Though most people interpret RSS to stand for Really Simple Syndication, the fact is that it is a whole family of syndication formats that includes Really Simple Syndication as well as Rich Site Summary and RDF Site Summary. But in reality, the precise syndication format is irrelevant to you, the end user, as long as you get the information you want.

RSS is particularly useful because it lets you combine information from a variety of sources in one location. No longer do you have to visit separate web sites for news, weather, stock reports, and so on. Instead you can subscribe to the RSS feed from each of the web sites and then have titles or brief summaries displayed in your RSS reader. When a title catches your interest, click the link to read the entire article.

Most modern web browsers support RSS feeds, and there are also many stand-alone programs, many of them free, for this purpose. Why then use Outlook? For me, it's a matter of having one place where I go for all sorts of information. I go to Outlook for email, appointments, contact information, tasks, and so on — why not for news and other RSS feeds?

RSS Aggregators?

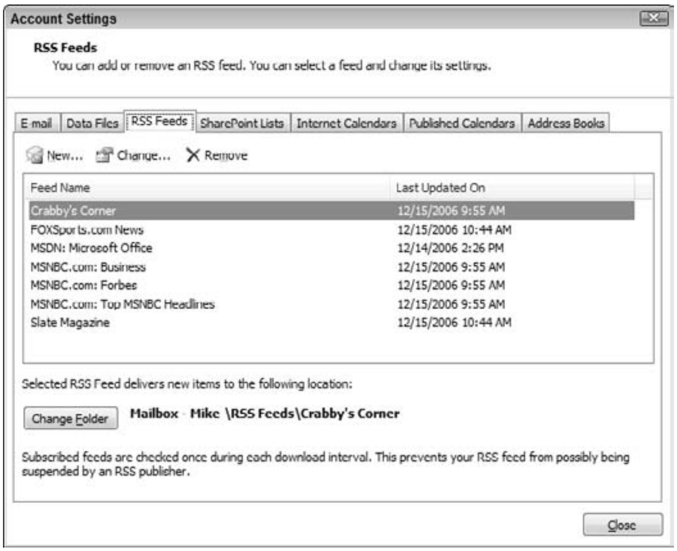
You may have heard the term *RSS aggregator* and wondered what it is. Nothing special — it just refers to a program, such as Outlook, that lets you subscribe to and view RSS feeds.

Subscribing to an RSS Feed

In Outlook, an RSS feed is considered to be a kind of account. Accordingly, you subscribe to feeds and edit or delete existing subscriptions in the Account Settings dialog box. To display RSS feed accounts, select Account Settings from the Tools menu and click the RSS Feeds tab. The dialog box is shown in Figure 16.1. In the figure, there are several RSS feeds listed, but if you are just getting started the list will be empty.

FIGURE 16.1

You use the Account Settings dialog box to work with RSS feed accounts.



To subscribe to an RSS feed you must know its URL. This is similar to the URL for a web page and will have this general form:

```
http://rss.somesite.com/rss/news.rss
```

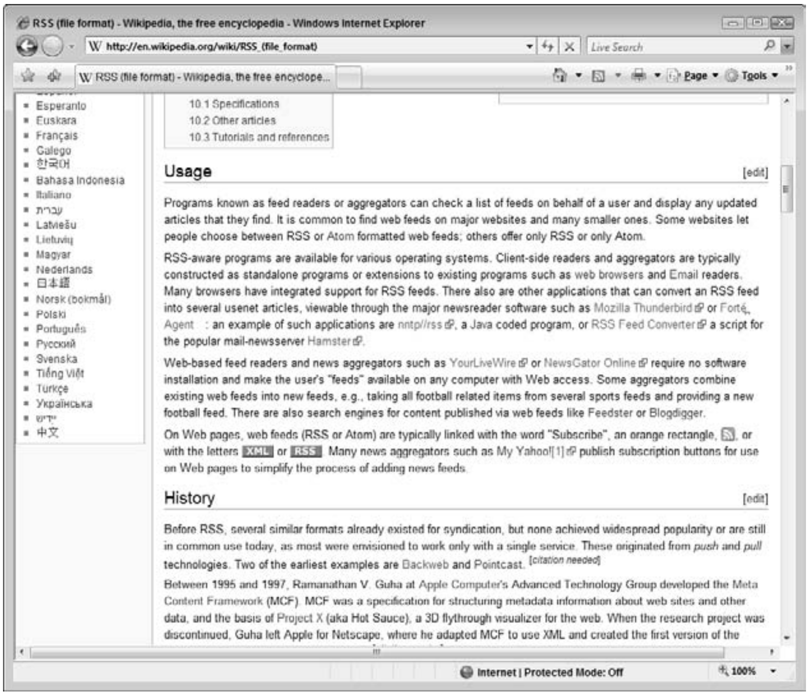
The file extension may be .RSS as in this example or it may be .XML. There are two ways to get the URL for an RSS feed. In one situation, the URL may be listed on the web site that offers the subscription, and you can simply copy and paste it into Outlook or just type it in. However, some web sites display small buttons that visitors can click to subscribe their browser to the feed. The most commonly used icons are shown in Figure 16.2.

When only an RSS button is displayed on a web site and not the URL of the feed, here's how to get the URL:

1. Right-click the button to display a context menu.
2. From the menu select Copy Shortcut (in Internet Explorer) or Copy Link Location (in Firefox) to copy the URL to the Windows Clipboard.

FIGURE 16.2

These icons are used on web sites to identify RSS feeds.



Once you have the URL of the RSS feed, here's how to subscribe Outlook to the feed:

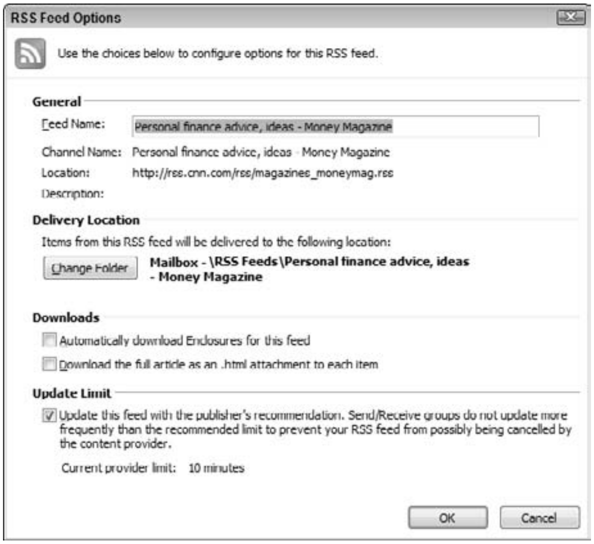
1. On the RSS Feeds tab of the Account Settings dialog box, click the New button to display the New RSS Feed dialog box (see Figure 16.3).
2. Paste or type the feed URL into the box.
3. Select Add to display the RSS Feed Options dialog box as shown in Figure 16.4.
4. Set options as described here (although these options rarely need changing):
   - **Feed Name:** You can accept the default feed name or enter your own. This name is displayed in Outlook to identify the feed.
   - **Change Folder:** If you want to change the folder where download feed items are kept, click this button. There is rarely a reason to do this.
   - **Automatically Download Enclosures...:** If you select this option, any enclosures that the RSS feed provides will be downloaded automatically when the feed is updated and not just when you view the feed.
   - **Download the Full Article...:** If you select this option, full articles will be downloaded automatically when the feed is updated rather than just on demand when you open them. This increases update time but lets you read articles when you are offline.
   - **Update Limit:** If this option is selected (recommended), the RSS feed will be updated at the publisher's recommended interval. If you turn this option off, Outlook may try to update the feed more often, which can cause your subscription to be cancelled.
5. Click OK to return to the Account Settings dialog box.
6. Click Close to close the Account Settings dialog box.

FIGURE 16.3

Subscribing to a new RSS feed.

FIGURE 16.4

Setting options for a new RSS feed.



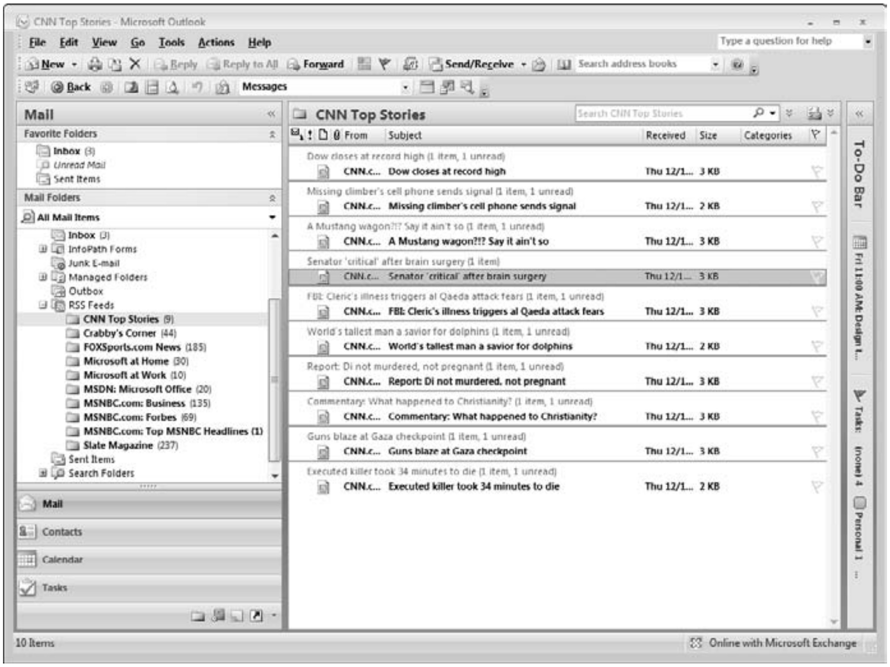
Displaying RSS Feeds

RSS feeds that you are subscribed to are displayed in the Outlook folder display in the navigation pane, as shown in Figure 16.5. The number next to each feed tells you the number of unread items in the feed.

To display a list of the items in a feed, click it. The items are displayed in a list in Outlook's main window, as shown in Figure 16.6. Each item's title is displayed, although you can change this as I explain soon. In many ways, feed items are like email messages — you can assign them to categories, flag them for follow up, forward an item to an email recipient, and so on.

FIGURE 16.5

Subscribed RSS feeds are displayed in the folder list.

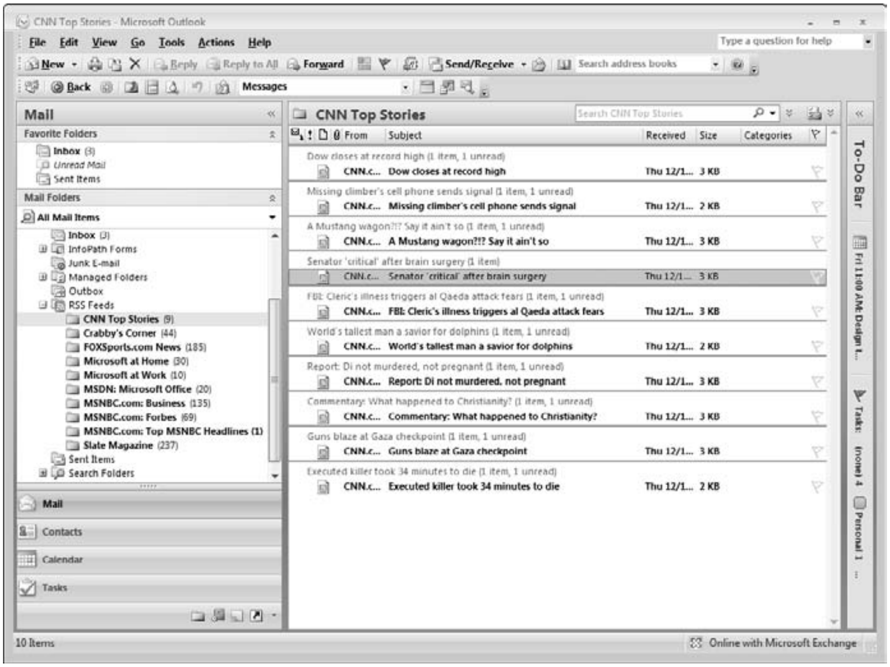


Renaming an RSS Feed

If you want to rename an RSS feed, right-click it in the folder list and select Rename from the context menu. You can then edit the name directly in the folder list.

FIGURE 16.6

The titles of the items in the selected RSS feed are displayed in the main window.

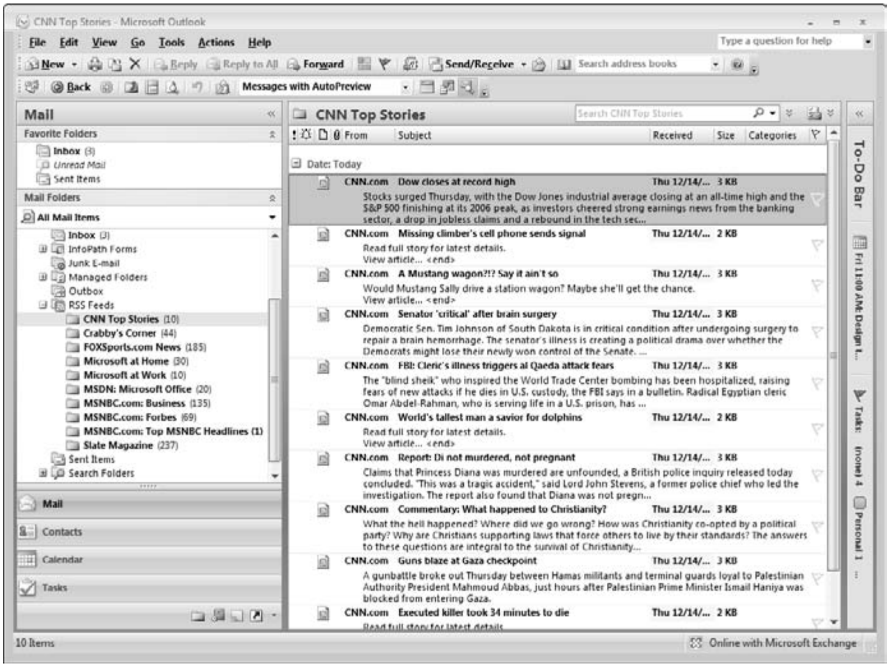


By default, RSS feed items are arranged by date received, with the newest at the top of the list. You can change this by selecting Arrange By from the View menu and then selecting the desired arrangement from the next menu.

You can also change the item display to show not only the title of each item but a brief synopsis (if provided by the feed publisher). To do so, select AutoPreview from the View menu. The display of RSS feed items with AutoPreview is shown in Figure 16.7. Select the same command again to turn AutoPreview off.

FIGURE 16.7

Use AutoPreview to display titles and summaries of RSS feed items.



When you open an RSS item by double-clicking it, it opens it its own window as shown in Figure 16.8. You can see that a summary of the article is displayed as well as a link to the full article (the link says "View Article"). At this point there are two slightly different things that you can do to read the article and any associated content:

- **View the article:** By clicking the View Article link you display the article in your default browser. This is just like viewing a web page.
- **Download the article and any content:** By clicking the Download Content button on the ribbon and then selecting Download Article, you download a copy of the article to your computer. It displays as an attachment to the RSS item, as shown in Figure 16.9. You can open this attachment to view in your browser.

The difference here is that in the second case you have a local copy of the article on your computer, whereas in the first case you do not. Note that if you select the Download the Full Article option when setting up the RSS feed account, this download happens automatically.

FIGURE 16.8

When you open an RSS item it appears in its own window.

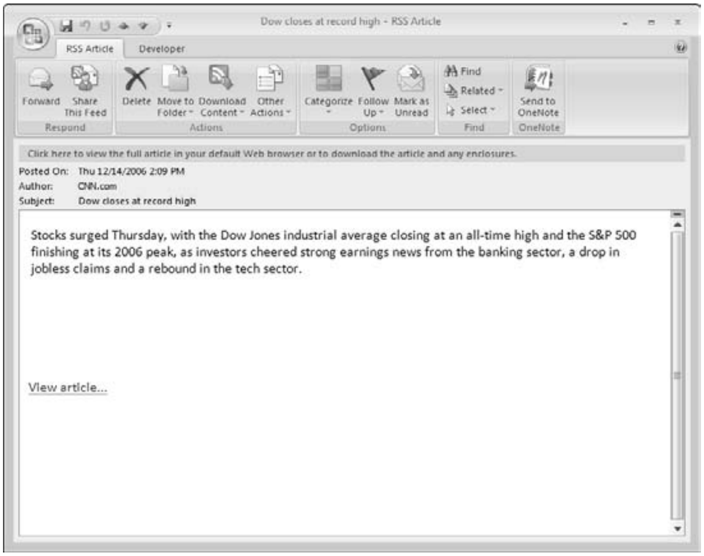
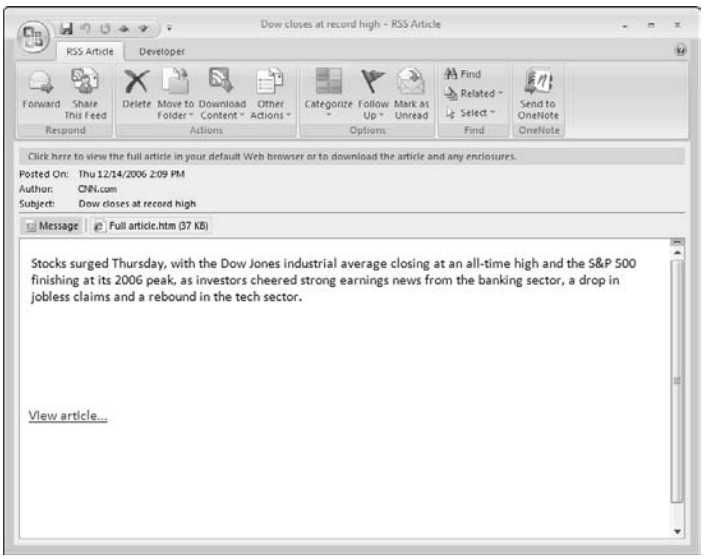


FIGURE 16.9

After you download an article, it is displayed as an attachment to the item.



Sharing Feeds with Other Outlook 2007 Users

When someone receives a Share This Feed invitation from you, the message contains the URL of the feed. Most people will have to add this URL to their RSS feed program manually, but Outlook 2007 users can click an Add This RSS Feed link to quickly add the feed to their RSS accounts list.

Other actions you can take with an open RSS item include:

- **Forward:** Click the Forward button on the ribbon to create a new email message with the article summary in the body and the full article attached. You can edit the message, address it, and send it to other people.
- **Share This Feed:** Click the Share This Feed button on the toolbar to create a new email message that contains information about the RSS feed. Then, address and send the message to whomever you desire. The recipients can then subscribe to the feed if they find it interesting.

Deleting and Changing RSS Feeds

To delete an RSS feed, you can right-click it in the folders list and select Delete from the context menu. You can also display the RSS Feeds tab of the Account Settings dialog box (select Account Settings from the Tools menu), click the RSS Feeds tab, click the feed you want to delete, and click Remove.

You can also modify the settings for a feed by selecting it in on the RSS Feeds tab of the Account Settings dialog box and clicking Change. The RSS Feed Options dialog box is displayed (shown earlier in Figure 16.4) where you can make the desired changes.

Importing or Exporting Groups of RSS Feeds

Outlook supports the ability to import and export collections of RSS feed configuration information. This information is stored in an XML file that has the .opml extension (which stands for Outline Processor Markup Language). This file can be forwarded by email or stored on a central

server and made available to employees. For example, a stock brokerage firm could put together a list of RSS feeds that it thinks would be useful to its brokers.

Exporting RSS Feed Information

To export an RSS feed collection:

1. Select Import and Export from the File menu to display the Import and Export Wizard (see Figure 16.10).
2. Select Export RSS Feeds to an OPML File.
3. Click Next. Outlook displays a list of RSS feeds that are defined in Outlook — in other words, feeds that you have subscribed to (see Figure 16.11).
4. Put checkmarks next to the RSS feeds you want to export and clear those that you do not want to export.
5. Click Next.
6. Enter the name of the file to export to, or click the Browse button to change folders and specify a name, then click Save.
7. Click Next to complete the export process.

FIGURE 16.10

Exporting RSS feed information to an OPML file.

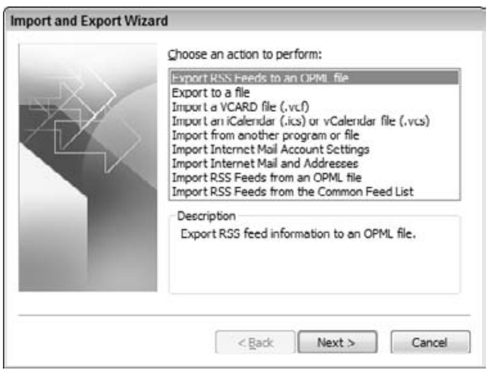


FIGURE 16.11

Selecting which RSS feeds to include in the OPML file.

Importing RSS Feed Information from an OPML File

Importing RSS information from an OPML file is essentially the reverse of the previous process:

1. Select Import and Export from the File menu to display the Import and Export Wizard.
2. Select Import RSS Feeds from an OPML File.
3. Click Next.
4. Enter the name of the file, or use the Browse button to find it.
5. Click Next.
6. In the next dialog box, put a checkmark next to the feeds that you want to import and clear those that you do not want to import.
7. Click Next.

Backing Up Your RSS Settings

Even if you do not need to share your RSS feed information with others, you can export it to an OPML file to serve as a backup.

Importing RSS Feed Information from the Common Feed List

Microsoft's web browser, Internet Explorer, can also be used as an RSS aggregator. If you have version 7 or later of the browser, it has the capability to share RSS feed information with Outlook — this is called the *common feed list*. In other words, RSS feeds you have subscribed to in Internet Explorer are available in Outlook, and vice versa.

When Outlook detects a compatible version of Internet Explorer, it asks you whether you want to combine and synchronize the lists. Select Yes if you want to be able to view all your RSS feeds in either program, both existing feeds and ones you add in the future. Select No to keep a separate list of RSS subscriptions in each program.

If you decide not to combine the RSS subscriptions for Outlook and Internet Explorer, you can always import subscriptions from the common feed list at a later time. The process is very similar to importing from an OPML file except that there is no file involved:

1. Select Import and Export from the File menu to display the Import and Export Wizard.
2. Select Import RSS Feeds from the Common Feed List.
3. Click Next.
4. In the next dialog box, put a checkmark next to the feeds that you want to import and clear those that you do not want to import.
5. Click Next.
6. Click Finish.

Summary

Really Simple Syndication, or RSS, is an excellent way to keep track of updated information from a wide variety of sources. Many different web sites publish RSS feeds on just about any topic you can imagine. Outlook's RSS aggregator tools let you subscribe to and view RSS feeds in the same program that you use for email, contacts, and appointments.

Part IV

Getting the Most Out of Outlook

IN THIS PART

Chapter 17

Making the Most of Outlook Categories

IN THIS CHAPTER

One of Outlook's most useful but underutilized features is categories. By using categories consistently, you can greatly simplify the task of using Outlook and finding the information you need. This is particularly true after you have been using Outlook for a while and the amount of information in Outlook has grown to a size that is hard to manage without categories.

Understanding Categories

We all use categories in our daily lives whether or not we are aware of it. At work, do you devote one file cabinet drawer to suppliers and another to customers? If so, you are using categories. At home, do you keep soups on one shelf in the pantry and vegetables on another? Again, categories. How about your CD collection — are your rock-and-roll CDs kept separate from your jazz and classical? It's hard to imagine getting by without using categories.

In Outlook, you can assign a category — or more than one category — to essentially every kind of item that Outlook has: email messages, tasks, appointments, notes, and so on. Then you can use various Outlook tools to organize and locate information based on category. There are three main ways to do this:

- In any item view, such as messages, tasks, or calendar, you can tell Outlook to organize the display by category making it easy to find related items.
- In any item view you can also use the search tool to display only those items assigned to a specific category.

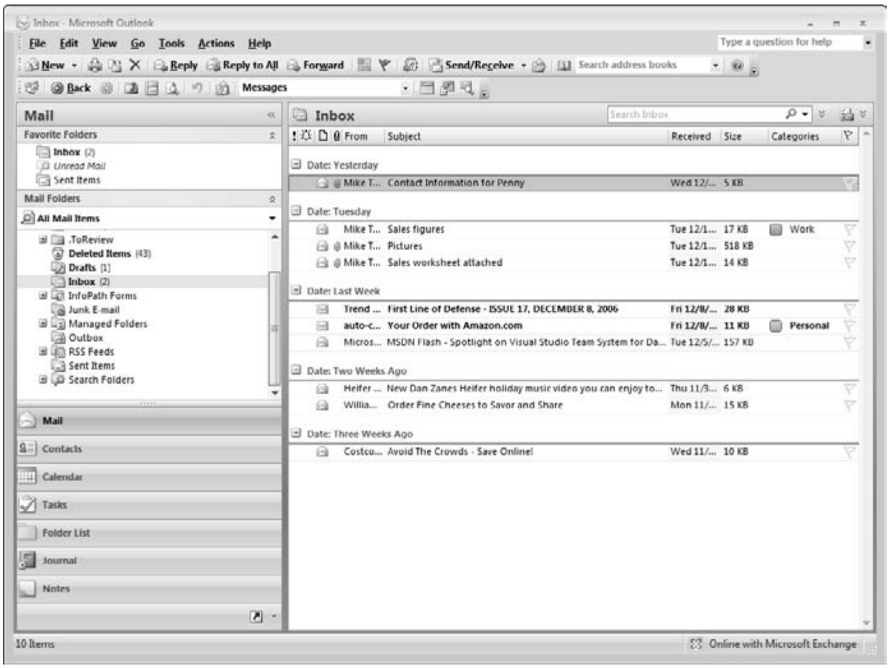
- You can use the Advanced Search tool to locate all items of any type assigned to a specific category.

The way you use categories depends on your specific situation. For some people, dividing items between Work and Personal categories is enough. A lawyer might create an Outlook category for each of his clients. A corporate vice president might create a category for each department that she oversees.

In Outlook, categories are sometimes called *color categories* because each category is associated with a color. This color is used to mark an item for quick identification. For example, Figure 17.1 shows how a categorized email message is marked in the Categories column. In this example, both the category color and category name are displayed, but if the Categories column were narrower, only the identifying color would appear. If an item has not been assigned to a category, the Category column will be blank.

FIGURE 17.1

Items are identified by the category color.



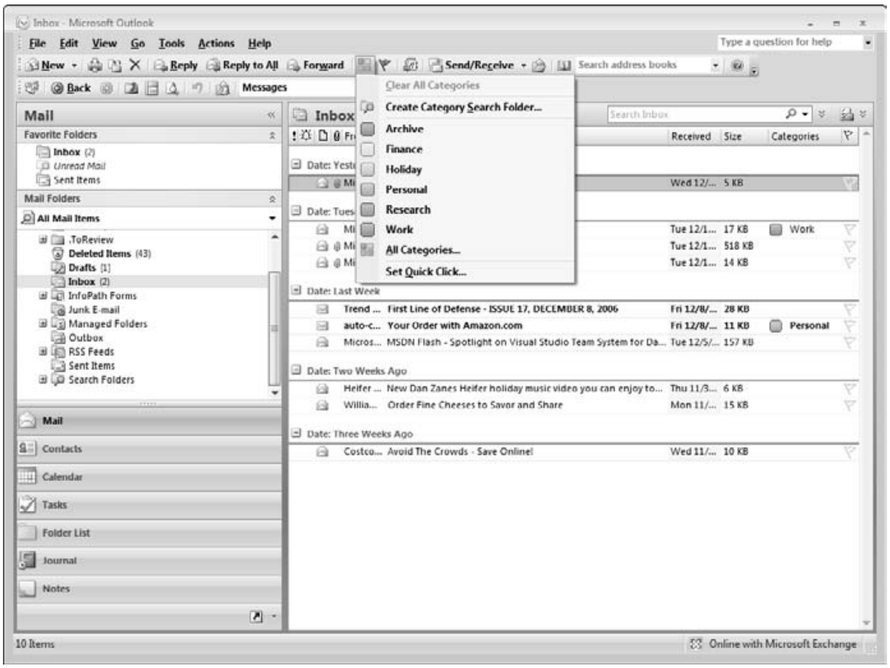
Working with the Category List

Outlook comes with a small set of defined categories. Each is named after its color — blue category, orange category, and so on. These names aren't too useful, so you'll want to rename them. You can also create new categories if the existing ones are not enough.

To work with the category list, click the Categorize button on Outlook's toolbar, as shown in Figure 17.2, and select All Categories from the menu. Outlook displays the Color Categories dialog box as shown in Figure 17.3. All defined categories are listed here. In the figure, you can see that two of the color categories have already been renamed. You can take various actions with categories in this dialog box, as described next.

FIGURE 17.2

The Categorize button.

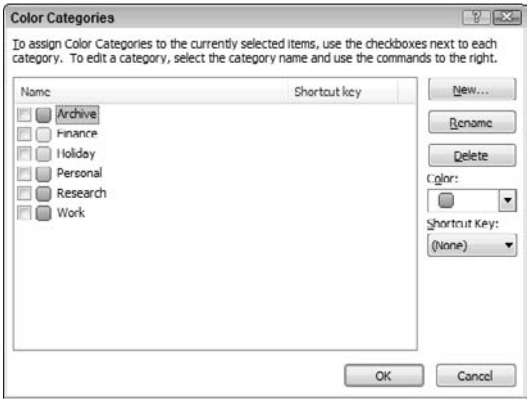


No Categorize Button?

If the Categorize button is not visible or is grayed out, it is probably because you do not have an item, such as an email message or task, selected. Because this button is also used to assign categories to items, it makes no sense to have it available if an item is not selected.

FIGURE 17.3

The Color Categories dialog box.

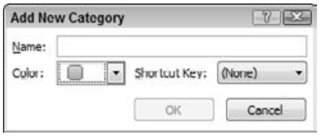


- To rename a category, click it and then click the Rename button. Edit the name as desired and press Enter. The new name applies to all items that have already been assigned this category as well as to new items.
- To delete a category, select it and click Delete.
- To create a new category, click the New button to display the Add New Category dialog box (see Figure 17.4). Enter a name for the category, select its color, and if desired select a shortcut key, then click OK.
- To change an existing category's color, select the category and choose from the Color list. Though Outlook does not prevent you from using the same color with two or more categories, it is not recommended.
- To assign a shortcut key to a category, select the category and choose a shortcut key from the list. The available shortcut keys are Ctrl in combination with the function keys F2 through F12. You can use a shortcut key to assign a category to a selected Outlook item without using the menus or toolbar. To unassign a shortcut key, select (none) from the list.

When finished, click OK.

FIGURE 17.4

Creating a new category.



Assigning Categories to Items

Assigning a category to an Outlook item is done the same way regardless of the type of item. You can assign one or more categories to an item, or remove a category assignment, when it is selected but not open — for example, if you have clicked a message in the Inbox:

- If you have assigned a shortcut key to the desired category, simply press the shortcut (for example, Ctrl+F3).
- To assign a single category, click the Categorize button on the toolbar and select the desired category from the menu. You can access the same menu by right-clicking the selected item in the Categories column.
- To assign multiple categories, click the Categorize button on the toolbar and select All Categories from the menu to display the Color Categories dialog box (shown earlier in Figure 17.3). Put a checkmark next to the categories that you want to assign to the item, then click OK.

You can assign categories to multiple items at once using the previous steps. All you need to do is select the items first:

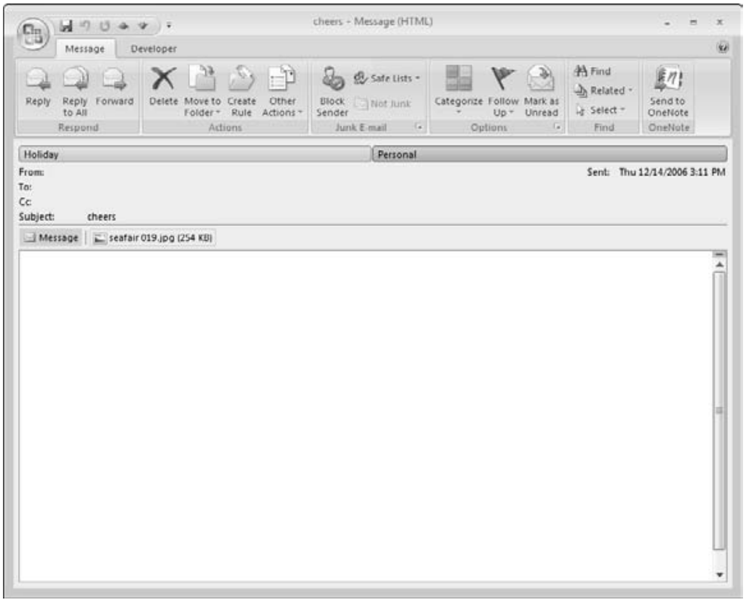
- To select a continuous range of items, click the first item and then hold down the Shift key and click the last item.
- To select individual items, click the first item and then hold down the Ctrl key while clicking other items.

You can also assign a category to an open item. Simply click the Categorize button on the ribbon and select from the menu.

An open item displays its assigned categories, if any, as colored bars just below the ribbon. For instance, Figure 17.5 shows an email message that has been assigned to the "Personal" and "Holiday" categories. Right-click a category bar to access a context menu that lets you work with categories.

FIGURE 17.5

An open item displays assigned categories just below the ribbon.



Organizing Items by Category

Each Outlook view — Mail, Contacts, Tasks, and so on — gives you the option of organizing the items in various ways. One of these options is to organize the view by category. Using the Task view for an example (other views work in much the same way), you can see in Figure 17.6 that the default organization is by due date — which makes sense for tasks. But you may want to organize them by category. You do so by selecting Current View from the View menu and then selecting By Category from the next menu. The resulting display is shown in Figure 17.7. If you have any items not assigned a category, they will have their own group.

FIGURE 17.6

The default Task view organizes tasks by due date.

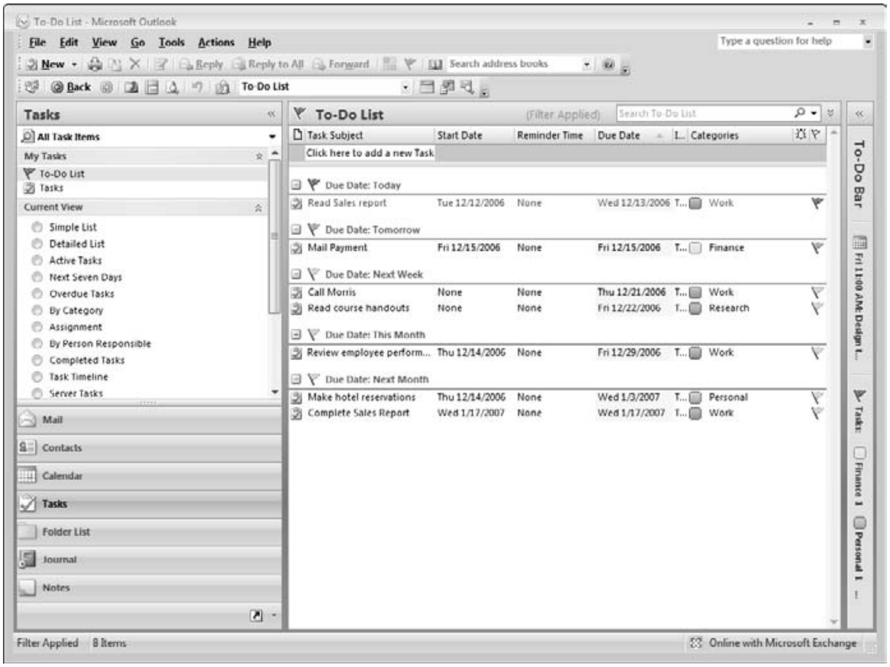
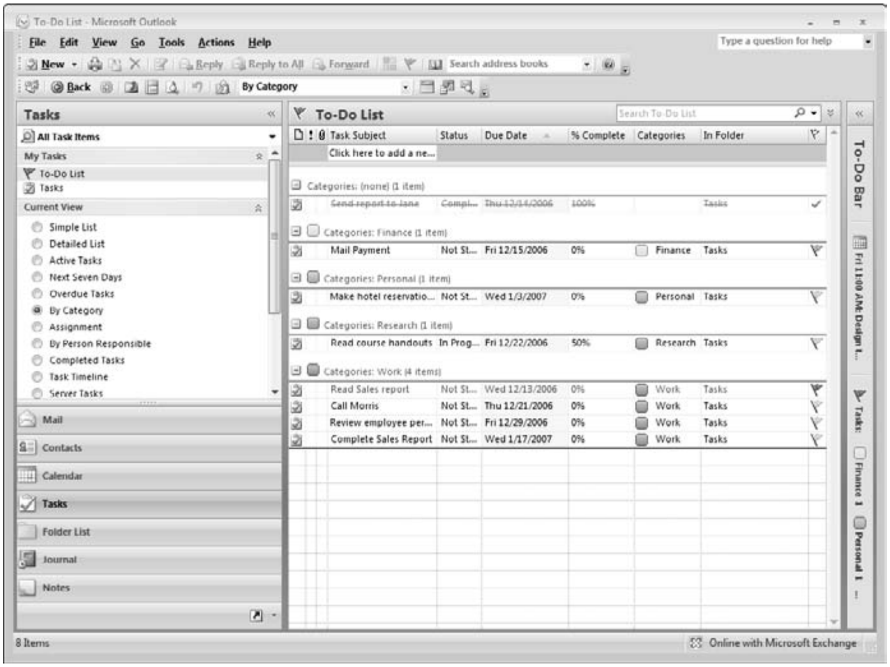


FIGURE 17.7

You can also display tasks and other items organized by category.



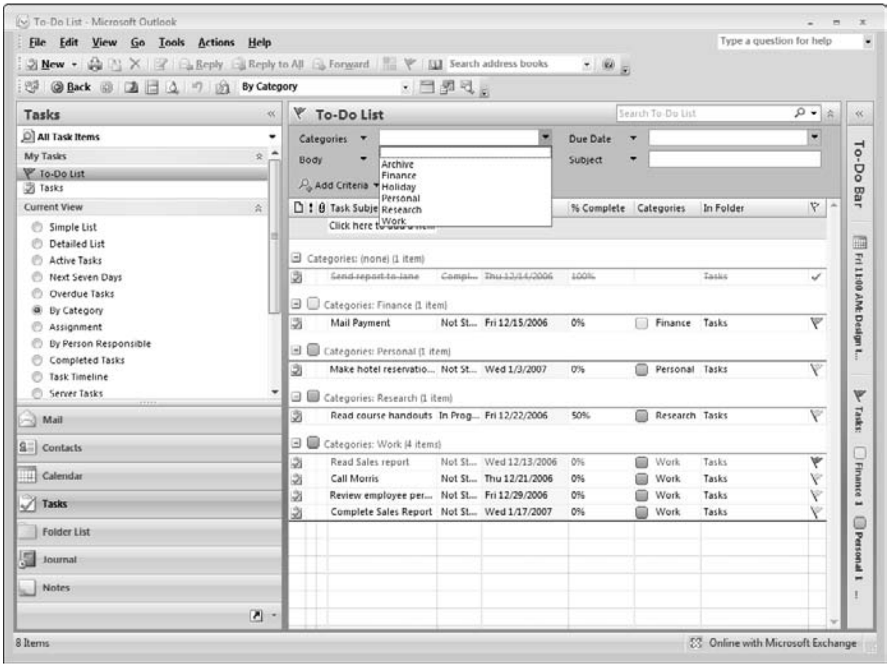
Filtering Items by Category

A *filter*, or search, goes beyond organizing items by category to display only those items assigned to one or more specified categories. Non-matching items are temporarily hidden. The search feature works in essentially the same way for all views and can be used for messages, appointments, contacts, and so on. I will use tasks to illustrate.

At the top right of the View window is a search field with an adjacent arrow. When you click the arrow, the search area expands to display more fields, as shown in Figure 17.8. Click the arrow again to hide these details.

FIGURE 17.8

Searching for items in a specified category.

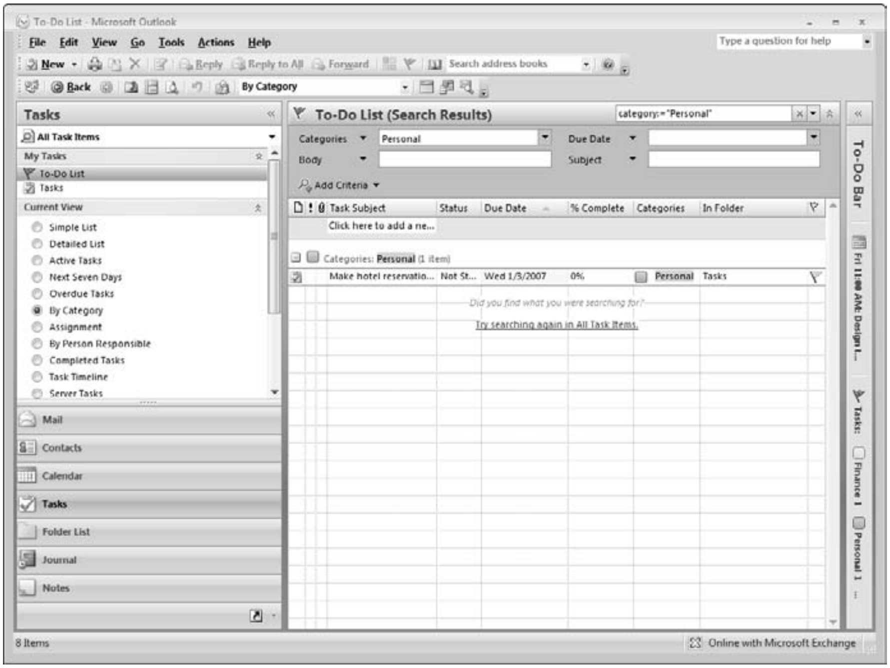


You can see that one of the search fields is Categories. If you click the arrow to the right of this field, you can select from a list of all Outlook categories. As soon as you do so, the display changes to show only those items that have been assigned that category, as shown in Figure 17.9. To cancel the filter and return to displaying all categories, click the X as shown in the figure.

Of course, you can combine a category filter with other filters. You could, for example, search for all tasks in the Personal category that have a due date next week. If the criterion you want to use is not shown, click the Add Criteria button to display a list of additional criteria from which you can select.

FIGURE 17.9

Displaying only those tasks in the Personal category.



Sending Messages with Categories

You can easily assign email messages that you have received to a category, as explained earlier in this chapter. You can also assign messages that you send to a category before you send them. There are three reasons you might want to do this:

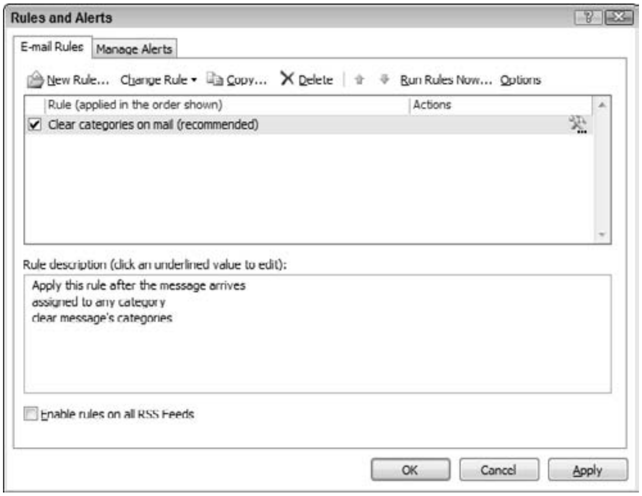
- The copy of the message in your Sent Items folder are assigned to that category and can be organized and filtered based on category, as described earlier in this chapter.
- The message the recipient gets is assigned to that category without their having to do anything.
- The category is added to the recipient's category list (if not already there).

There's a potential fly in the ointment, however. Many installations of Outlook have a rule defined that automatically removes any categories from received messages (Outlook rules are covered in Chapter 9). If this rule is active, you'll never know if someone sends you a message with a category assigned. For reasons that are not clear, Microsoft recommends that you keep this rule active. If you choose, however, you can turn it off as follows:

1. Select Rules and Alerts from the Tools menu to display the Rules and Alerts dialog box.
2. If necessary, click the E-mail Rules tab (see Figure 17.10).
3. If the Clear Categories on Mail rule is listed and checked, it is active. Clear the checkmark to turn the rule off (you can always turn it back on later).
4. Click OK.

FIGURE 17.10

Turning off the Clear Categories rule.



Using a Quick Click Category

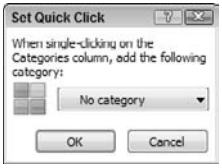
Usually you have to select from a list or a dialog box to assign an Outlook item to a category. If there is one category you use more than any other, you can make it your Quick Click category and then assign it to any item by clicking once in the category column. Click again to remove the category. Other categories can still be assigned in the usual manner.

To set or change the Quick Click category:

1. Click the Categorize button on the toolbar.
2. Select Set Quick Click from the menu. Outlook displays the Set Quick Click dialog box (see Figure 17.11).
3. Select the desired category from the list, or select No Category if you do not want to have a Quick Click category.
4. Click OK.

FIGURE 17.11

Specifying the Quick Click category.



Summary

Though many Outlook users do not make use of categories, they can be a very useful feature. This is particularly true when you have been using Outlook for a while and have accumulated a large amount of information. Having information is one thing, but being able to use it efficiently is another! Categories let you organize and view your Outlook items as you see fit.

Chapter 18

Working with Outlook Folders and Data Files

Outlook stores all its data in one or more files on your hard disk (with the exception of certain Exchange account configurations). Within those files, some items are organized into folders. To use Outlook with maximum efficiency, you may want to know how to work with these folders and files.

You should be aware, however, that most users never need to be concerned with Outlook's files and folders — the default arrangement is just fine for their purposes. I recommend that you do not change Outlook's file and folder settings unless you have a real need to do so.

IN THIS CHAPTER

Understanding Files and Folders

All computer users are familiar with the idea of a *file*. It's a unit of storage on a disk that contains data, such as a word processing document, a spreadsheet, or a digital photograph. Outlook uses files to store all its information, ranging from email account settings and user options to all its email messages, appointments, tasks, and other items. In fact, Outlook uses a single file called an *Outlook Personal Folders file* to store just about everything.

Most computer users are also familiar with the concept of a *folder* (sometimes called a *directory*). Folders are used to divide a hard disk into discrete storage areas — can you imagine the confusion if all your files were stored in the same location? Outlook uses folders, too, but they are not the same as disk folders. They serve the same purpose — to help organize the items stored — but they exist within the Outlook Personal Folders file and not as separate folders on your hard disk.

Outlook folders come in different types based on the kind of item they are designed to hold. For example, your Inbox is a folder and it is intended to hold email messages, but you cannot store a contact there.

Outlook Data Files

For most Outlook users, program data and items are stored in an Outlook Personal Folders file. This is true if you are using a POP, IMAP, or HTML email account. The file has the .PST extension and is by default named OUTLOOK.PST. The folder on your hard disk where this file is normally kept is

- **Windows XP and Windows Server 2003:** X:\Documents and Settings*user*\Local Settings\Application Data\Microsoft\Outlook
- **Windows Vista:** X:\ *user*\Local Settings\AppData\Microsoft\Outlook

Here, X is the drive letter, usually C, where the operating system stores user settings, and *user* is the name you have used to log on to Windows. If the computer is configured for more than one user, each will have their own separate and independent Outlook Personal Folders file.

You can have more than one Personal Folders file, but only one is designated as the default, which means Outlook uses it to store account settings, messages, and other items. Additional PST files are used for special purposes such as archiving old items. You cannot change the storage location of the default PST file.

Outlook Data File Compatibility

Beginning with Outlook 2003 and continuing with the current version, Microsoft changed the internal format of PST files to allow for storage of more items and folders and to support multilingual Unicode data. This format is not compatible with Outlook versions 97 through 2002. If you install a new Outlook over one of these older versions, the old format PST file will be automatically converted to the new format. If, however, you want your PST file to be compatible with Outlook 2002 and earlier, you must create a PST file in the older format. This is explained later in this chapter in the section "Creating a New Personal Folders File."

Hidden Folders?

The folder where the Outlook data file is kept may be *hidden*, which means that it normally does not show up in Windows Explorer or My Computer. To see hidden folders and files, you must change a view option by selecting Options from the Tools menu (in My Computer or Explorer, not Outlook) and then on the View tab, selecting the Show Hidden Files and Folders option.

Offline Folders File

If you use a Microsoft Exchange email account rather than, or in addition to, an IMAP, POP, or HTML account, you may have an Offline Folders file (which has the .OST extension). Normally, Exchange keeps copies of your messages and other items on the server, but you can configure Outlook to keep a local copy of the items on your system, in the Offline Folders file. Doing this allows you to work with your Outlook items when a connection to the Exchange server is not available. You can find more details on OST files in Chapter 28.

Working with Outlook Folders

Outlook folders let you organize all the myriad items that you work with in Outlook. Outlook comes with a default set of folders that is a good starting point, but many users find these folders to not be enough. This section shows you how to create new folders and work with folders and folder items.

As I mentioned earlier, Outlook folders are designed to hold a specific type of item. The choices are

- **Calendar folders** hold appointments and other scheduling items.
- **Mail folders** hold email messages.
- **Contacts folders** hold contact information.
- **Journal folders** hold journal entries.
- **Task folders** hold task items.
- **Notes folders** hold notes.

You cannot move an item into a folder of the wrong type, such as moving an email message into a contacts folder. The one exception to this rule is the Deleted Items folder, which can hold any type of item.

NOTE **Note that RSS feed items are treated like email messages by Outlook when it comes to folder types.**

Outlook's Default Folders

When installed, Outlook has a set of default folders located at the top level in your Personal Folders file. You cannot rename, move, or delete these default folders. They are

- **Calendar:** Holds calendar items (appointments, and so on).
- **Contacts:** Holds your contacts.

- **Deleted Items:** Holds any and all items you have deleted before they are permanently deleted. See the section "Using the Deleted Items Folder" later in this chapter.
- **Drafts:** Holds email messages you have started composing but not yet sent.
- **Inbox:** Holds received emails.
- **Journal:** Holds your journal items.
- **Junk E-mail:** Holds email that has been flagged as junk (spam).
- **Notes:** Holds your notes.
- **Outbox:** Holds emails that you have sent but that have not yet been transferred to your email server.
- **Quarantine:** Holds emails that have been flagged as containing a virus, worm, or other malicious element.
- **RSS Feeds:** Holds content from your subscribed RSS feeds.
- **Sent Items:** Holds copies of email messages you have sent.

Creating a New Email Folder

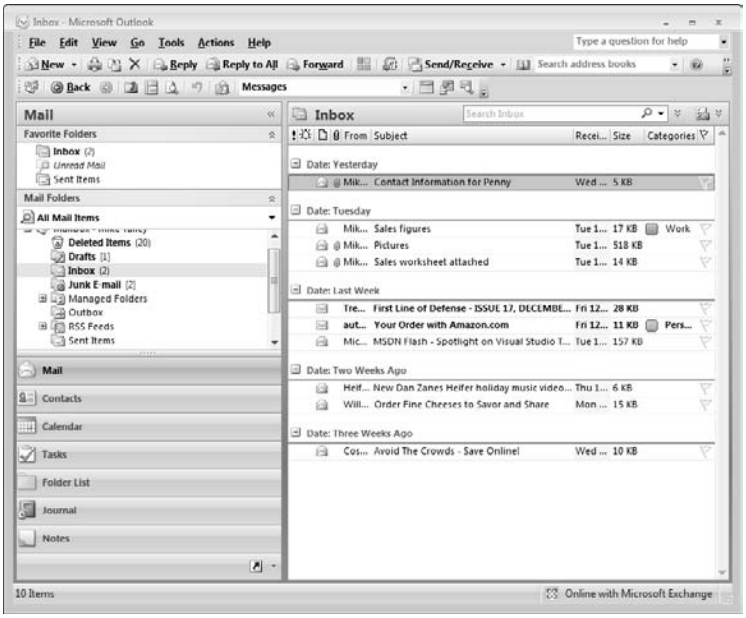
Email folders get their own section because Outlook treats them a bit differently from other folders. To be more specific, you cannot organize email folders into groups, but rather have to organize them hierarchically when you create them.

When you create a new email folder, you can place it at the top level under Personal Folders — the same level as Outlook's default folders. You can also put it in an existing folder. You can put folders within folders to essentially any level and thereby organize your email messages in the way that best suits you.

Take a look at an example. Figure 18.1 shows Outlook's default email folders. You can see that they are all at the same level within Personal folders.

FIGURE 18.1

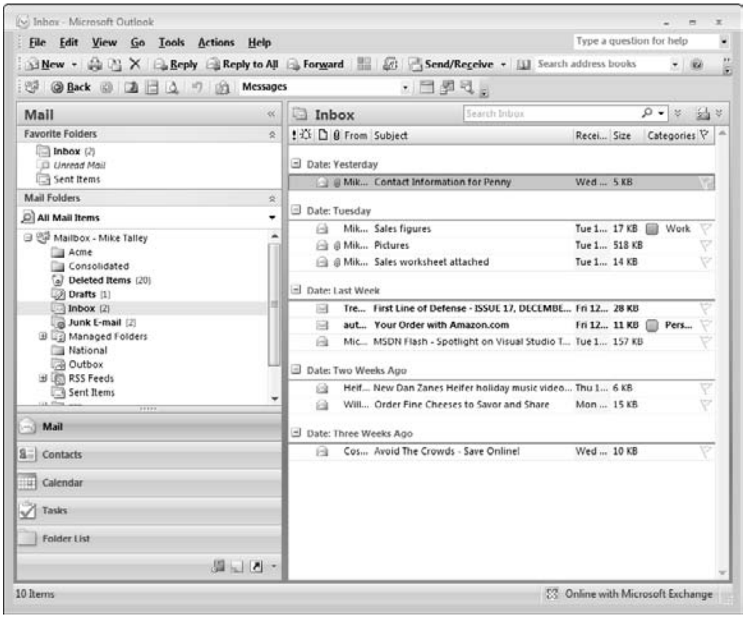
The organization of Outlook's default email folders.



Suppose you want to organize emails from your clients by creating an email folder for each client. For this example, assume that you have three clients: Acme, Consolidated, and National. One approach would be to create three new folders at the top level. The resulting structure is shown in Figure 18.2.

FIGURE 18.2

New email folders can be created at the top level of the folder hierarchy.

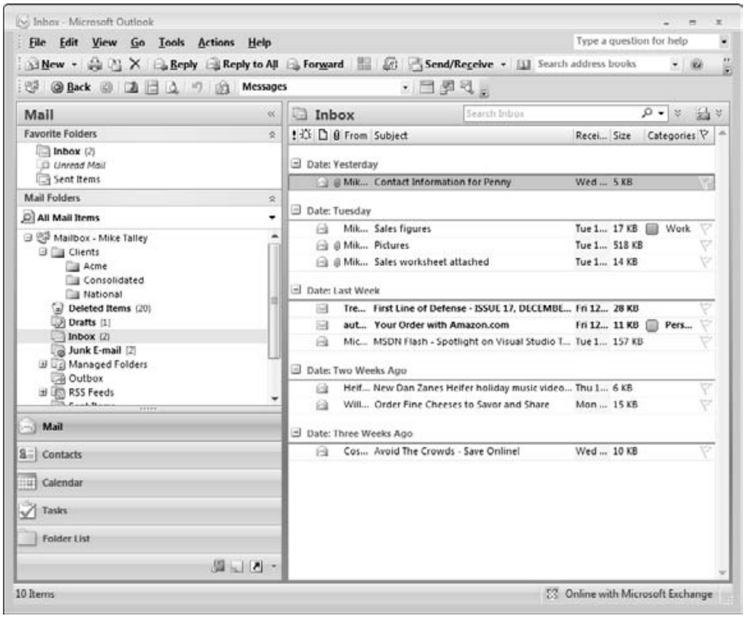


Another approach, one that I prefer, is to use the capability to create folders within other folders, resulting in a hierarchy of folders structured according to the folder contents. This approach could be implemented by creating a Clients folder at the top level and then creating Acme, Consolidated, and National folders in the Clients folder. This structure is shown in Figure 18.3. Note that a folder that contains other folders — Clients in this case — displays an adjacent plus or minus icon that you can click to show or hide the subfolders.

In any event, you do not have to decide all the details of your email folder structure ahead of time because you can always move the folders around if needed.

FIGURE 18.3

New email folders can also be created in a hierarchical structure by placing folders within other folders.



Now you can get to the details of creating a new email folder. Here are the steps to follow:

1. If necessary, click the Mail button on the navigation pane to display the mail folders.
2. If you want the new folder at the top level, right-click Personal Folders (or whatever name you have assigned to the top level). Otherwise, right-click the folder that you want the new folder in.
3. Select New Folder from the context menu. Outlook displays the Create New Folder dialog box (see Figure 18.4). The location for the new folder is shaded in the folder display—Inbox in the figure, for example. You can, if necessary, change the location at this point.
4. Type the name of the new folder in the Name box.
5. Make sure that Mail and Post Items is selected in the Folder Contains list.
6. Click OK.

The new folder is created and you can start using it to store mail items.

FIGURE 18.4

Creating a new folder to hold email items.

Creating a New Non-Email Folder

Non-mail folders — those for tasks, calendar, journal, and contacts — are handled a bit differently than mail folders. Rather than organize folders by placing them in other folders, as you do with mail folders, you use *groups*. First, here are the steps to create a non-mail folder:

1. Click the appropriate button in the navigation pane corresponding to where you want to add a new folder — Calendar, Contacts, and so on.
2. Select Folder from the File menu, then select New Folder from the next menu. Outlook displays the Create New Folder dialog box (see Figure 18.5). The folder for the type of item you selected in step 1 — Tasks in the figure, for example — will be highlighted in the folder list.
3. Enter the name of the new folder in the Name box.
4. Make sure that the Folder Contains list displays the appropriate type of item for the folder you are creating.
5. Click OK.

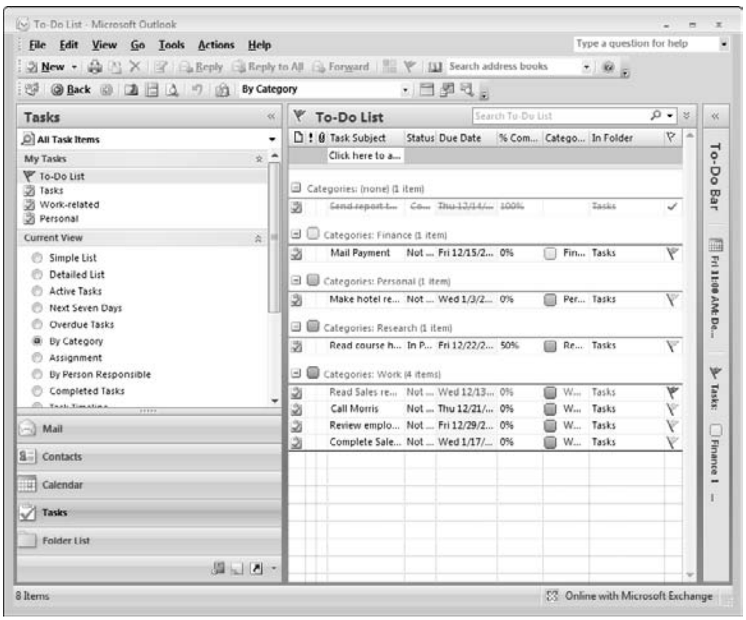
After you create a non-email folder, it is displayed near the top of the navigation pane along with other folders, including the default one, for that type of item. Figure 18.6 shows an example for Tasks after creating two new task folders called Work-related and Personal.

FIGURE 18.5

Creating a new folder to hold non-email items, Tasks in this case.

FIGURE 18.6

User-created folders for non-email items are displayed along with the default folder in the navigation pane.



WARNING **You can create new Task folders if you wish, but be forewarned that task items you move from the default task folder to a new folder will not be updated if you have assigned the task to someone else and receive accept, decline, or progress update messages.**

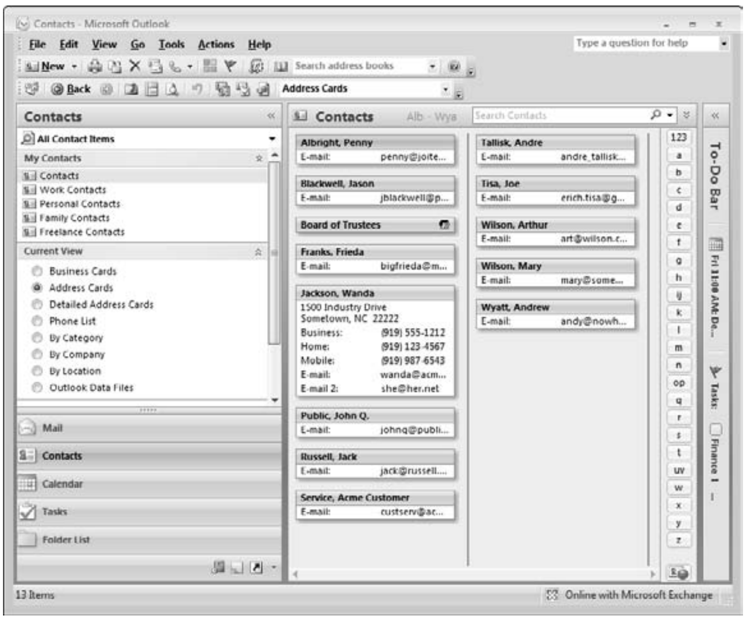
Organizing Folders in Groups

Outlook folders that are not email folders can be organized into groups. This is similar in concept to organizing email folders by their location in the folder hierarchy, but the procedures are a bit different.

By default, every category of non-email item has a single group with a name such as My Contacts, My Tasks, and so on. If you create new folders, they are displayed as part of this default group. For example, Figure 18.7 shows the contact folders after adding four new folders to the default Contacts folder. They are all part of the default My Contacts group (which can be expanded or collapsed using the adjacent arrow).

FIGURE 18.7

All folders for non-email items are initially part of the default group, My Contacts in this figure.



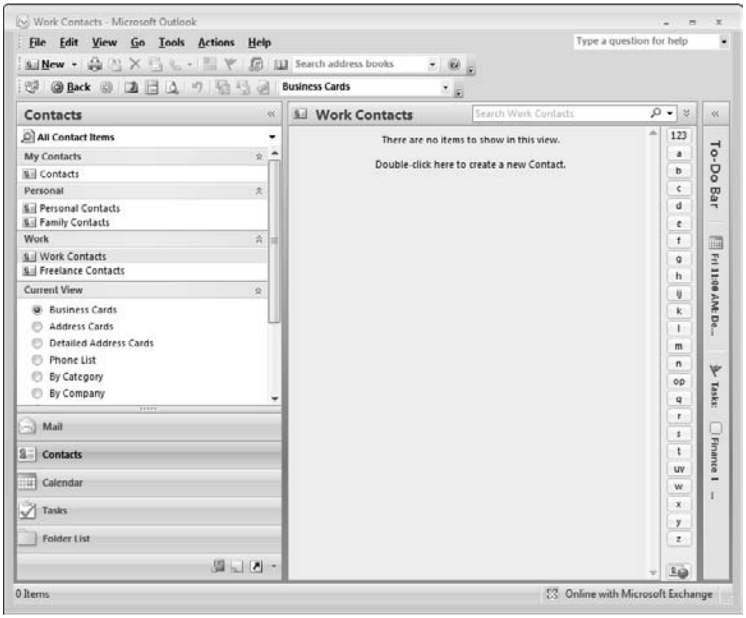
By creating new groups you can organize these folders as desired. In this example, there are five contact folders and you might want to arrange them as follows:

- The Contacts folder, for miscellaneous contacts, remains in the My Contacts group.
- The Personal Contacts and Family Contacts goes into a new group named Personal.
- The Work Contacts and Freelance Contacts folders goes into a new group called Work.

The result of this reorganization (which you learn how to do in a moment) is shown in Figure 18.8. Now, you can expand and contract individual groups to find just the items you need.

FIGURE 18.8

Folders can be organized into separate groups.



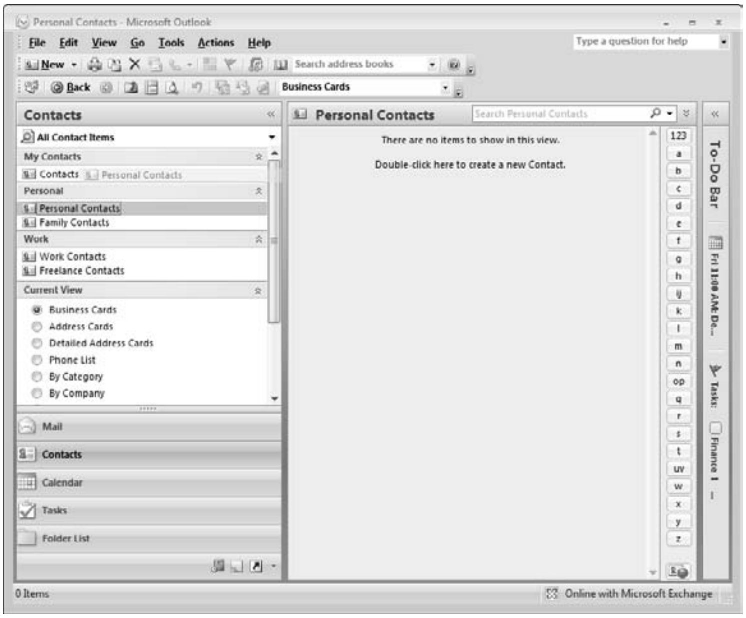
Creating a New Group

To create a new group, right-click an existing group (for example, My Contacts in Figure 18.9) and select New Group from the context menu. Then, type in the name for the group and press Enter.

A newly created group is empty, as you might well expect. To move a folder to it, point at the folder, press and hold the left mouse button, and drag it to the destination folder. Figure 18.9 shows how you would move the Personal Contacts folder to the My Contacts group.

FIGURE 18.9

Moving a folder to a different group.



To create a new folder within a group, follow the procedures earlier in this chapter for creating a new folder, then move it to the desired group.

Working with Groups

You can take the following actions with a group by right-clicking it and selecting from the context menu:

- Rename the group.
- Remove the group (and any folders it contains).
- Arrange by Name — order the folders in the group alphabetically.
- Move Up/Down in List — change the position of the group in the list.

Additional actions you can take with groups are covered in the next section.

Working with Folders, Groups, and Items

This section covers the everyday tasks that you'll need to perform with your folders, groups, and Outlook items in order to keep them organized.

Viewing Folder Contents

When you switch from one type of item to another — for example, from viewing mail items to viewing contact items — Outlook automatically displays the contents of one folder, usually the default one, in the main Outlook window. To view the contents of another folder (also called opening the folder):

- Click the folder to display its contents in the main window.
- Right-click the folder and select Open in New Window to view the folder's contents in a new window.

You can open as many new windows as you want. When you close a window, Outlook remains running as long as at least one window is open.

Moving or Copying Items

Outlook lets you move or copy items between folders. For some types of items, only moving is allowed, not copying. To move or copy one or more items, you must first select them:

- **To select a single item**, click it.
- **To select multiple contiguous items**, click the first item then hold down the Shift key and click the last item.
- **To select multiple non-contiguous items**, click the first item then hold down the Ctrl key and click each additional item.
- **To select all items in the folder**, press Ctrl+A. You can then deselect individual items with Shift+Click.
- **To deselect multiple items**, release any key and click any non-selected item.

Now you can move/copy the selected items in one of several ways:

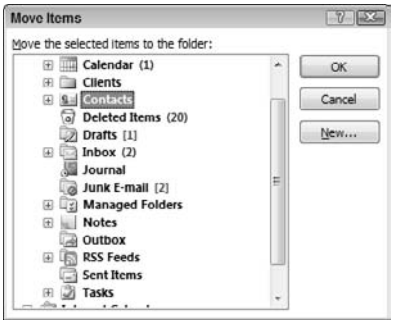
- Drag the item or group of items to the destination folder and drop.
- Select Cut (to move) or Copy from the Edit menu. Then, open the destination folder and select Paste from the Edit menu.
- Select Move to Folder from the Edit menu. Outlook opens the Move Items dialog box, shown in Figure 18.10. Select the destination folder from the list and click OK. You can also click the New button in this dialog box to create a new folder.

Shortcut Keys for Copy, Cut, and Paste

The standard Windows shortcut keys work in Outlook: Ctrl+C for copy, Ctrl+X for cut, and Ctrl+V for paste.

FIGURE 18.10

Moving an item or items to a different folder.



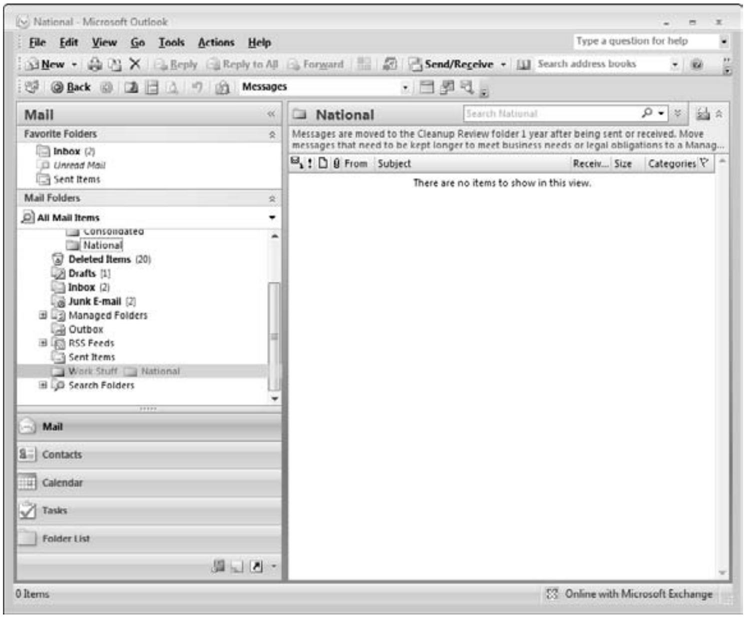
Moving, Copying, Deleting, and Renaming Folders

As you fine-tune your Outlook organization, you may want to move folders to new locations. Depending on the type of folder, you may be able to copy a folder as well. Email folders can be moved to a new location in the folder hierarchy, and other folders can be moved from one group to another.

To move an email folder, point at it and drag it to the new location. For example, Figure 18.11 shows how you would move the National folder from its location in the Clients folder to a new location in the Work Stuff folder.

FIGURE 18.11

Moving an email folder to a new location.



To move a non-email folder, point at it and drag it from the current group to the new group. Figure 18.12 shows how you would move the Freelance Contacts folder from the Work group to the My Contacts group.

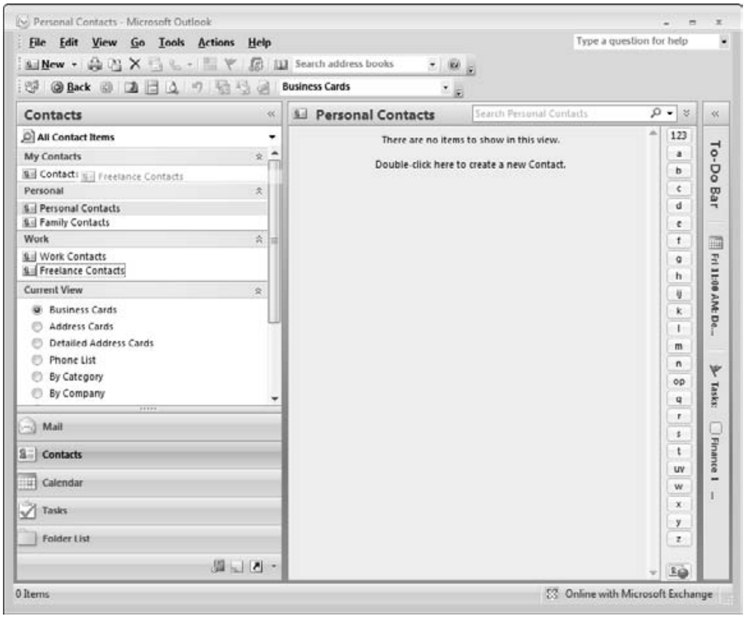
You can also use the Copy (when allowed), Cut, and Paste commands on the Edit menu to copy and move folders.

To delete a folder, right-click it and select Delete *XXXX* (where *XXXX* is the name of the folder) from the context menu.

To rename a folder, right-click it and select Rename *XXXX* (where *XXXX* is the name of the folder) from the context menu, and then type in the new name and press Enter.

FIGURE 18.12

Moving a contacts folder to a new location.



Creating a New Personal Folders File

By default, Outlook has a single personal folders file called *Personal Folders* and with the filename Outlook.PST. In many cases, there will be a second personal folders file named Archive.PST used for archiving expired items (archiving is explained later in this chapter). You can also create additional personal folders files if you wish.

Why would you want to have more than one personal folders file? Here are a few reasons that people use multiple personal folder files:

- **For backup and archiving.** You can create a second personal folders file and move items to it for backup. This reduces clutter in your main Personal Folders file while keeping the items in case you should need them at some future date.
- **For organization.** You may want to keep all items for a large project in their own file and use the default file for all other items.
- **For transfer.** If you use a desktop computer as well as a laptop, you can have your default PST file as well as a second one that is transferred between the two computers.

To create a new personal folders file:

1. Select New from the File menu, then select Outlook Data File. Outlook displays the dialog box shown in Figure 18.13 where you select the format of the file.
2. Most users should select Office Outlook Personal Folders File. Select Outlook 97-2002 Personal Folders File only if you need the new file to be compatible with these older versions of Outlook.
3. Click OK. Outlook displays the Create or Open Outlook Data File dialog box, shown in Figure 18.14.
4. The default location is the same folder where the default Personal Folders file is kept (as explained earlier in this chapter). You can accept this location or select another one.
5. Enter a descriptive name in the File Name box.
6. Click OK. Outlook displays the Create Microsoft Personal Folders dialog box (see Figure 18.15).
7. Enter the display name for the file in the Name box. This is not the filename but the name displayed in Outlook.
8. If you want to password-protect the file, enter the password in the Password and Verify Password boxes.
9. Select the Save This Password option if you want Outlook to remember your password so you do not have to enter it each time you open the file.
10. Click OK.

WARNING **When you password-protect an Outlook data file, having Outlook remember your password may be convenient but it sort of defeats the purpose of password protection.**

FIGURE 18.13

Selecting the format for a new personal folders file.

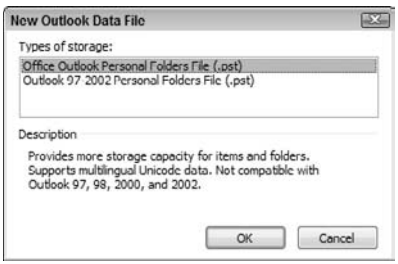


FIGURE 18.14

Specifying the name and location for a new personal folders file.

FIGURE 18.15

Specifying the display name and password for a new personal folders file.

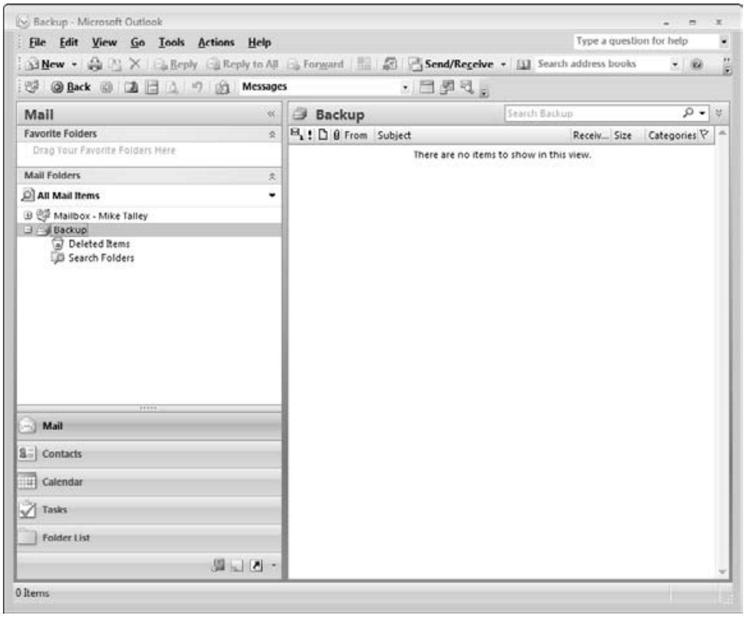
What's a Personal Folders File?

Outlook terminology on this point can be confusing. Any Outlook data file with the .PST extension is a personal folders file, no matter what it is named. However you have only one Personal Folders file — this is the default personal folders file and is listed as "Personal Folders" in the navigation pane.

After you have created a new personal folders file, it is displayed in the navigation pane along with your Personal Folders file and archive file (if you have one) as shown in Figure 18.16. You can close the file by right-clicking it and selecting Close from the context menu. To open a personal folders file, select Open from the File menu, then select Outlook Data File from the next menu.

FIGURE 18.16

Additional personal folder files are displayed in the navigation pane.

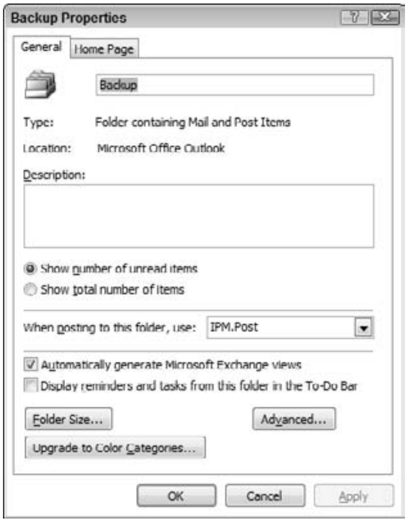


Setting Personal Folder File Options

Each personal file folder has a few options, or *properties*, that you can change if desired. To access these properties, right-click the file in the navigation pane and select Properties from the context menu. Outlook will display the *XXXX* Properties dialog box as shown in Figure 18.17 (where *XXXX* is the name of the file). The items on the General tab are

FIGURE 18.17

Setting properties for a personal folders file.



- **Name:** The display name of the personal folders file. You cannot change this here but must use the Advanced button as described later in this list.
- **Description:** Enter an optional description for the file.
- **Show...:** Select whether the folders in the file display the number of unread items or the total number of items in parentheses after the folder name.
- **When Posting to This Folder Use:** Use this option to select a form that will be used as the default for postings to this folder.
- **Automatically Generate Microsoft Exchange Views:** Select this option if you want Outlook to automatically create views of public folders that can be viewed by other Exchange users. Relevant for Exchange accounts only.
- **Folder Size:** Click this button to view information about the overall size of the file and the size of each of its subfolders.
- **Upgrade to Color Categories:** Click this button if you want to upgrade mutli-colored For Follow Up Flags and Calendar Labels to Color Categories (these items may be present in a PST file imported from an earlier version of Outlook).
- **Advanced:** Click this button to open a dialog box where you can change the display name for the file, change or assign a password, and compact the file to save disk space.

The properties dialog box for a personal folders file also has a Home Page tab, shown in Figure 18.18. The settings here determine what Outlook displays in its main window when the Personal Folders file (not one of its folders) is selected in the navigation pane. There are three options:

FIGURE 18.18

Setting the home page for a personal folders file.

- **Turn the Show Home Page option off:** The main window displays blank when the file is selected.
- **Turn the Show Home Page option on and use the default address:** The main window displays Outlook Today with a summary of tasks and messages.
- **Turn the Show Home Page option on and enter another address:** The main window displays the page, which can be local or remote. You can type in a URL or use the Browse button to find a local file.

Click the Restore Defaults button to return to the default address of the Outlook Today page.

NOTE **You can customize the Outlook Today page to meet your needs. This topic is covered in Chapter 19.**

Using the Search Folders

Search folders are an Outlook tool that lets you automate the process of finding certain email messages. A search folder is a virtual folder that displays messages that meet certain criteria. You can display messages from certain people, messages with specified words in the subject or body, messages with attachments, messages with importance marked as high — the possibilities are seemingly endless.

What do I mean by *virtual*? It means that the search folder does not actually contain the message but only displays it — the message itself remains in its original folder such as the Inbox.

The Default Search Folders

Outlook is installed with three default search folders, located in the folder Search Folders. They are

- **Categorized Mail** displays all mail items that have been assigned a color category.
- **Large Mail** displays all messages larger than 100 KB.
- **Unread Mail** displays messages that have not been read.

The default folders are not set in stone — you can delete them, rename them, and redefine their criteria, as explained next. You cannot, however, move them.

Adding a Predefined Search Folder

Outlook comes with a number of predefined search folders (including the default search folders). You can add any of these folders as follows:

1. In Mail view, select New from the File menu, then select Search Folder. Outlook displays the New Search Folder dialog box (see Figure 18.19).
2. Click the search folder you want to add.
3. For some search folders, a Choose button is displayed. Click this button to specify additional criteria for the search folder. For example, if you select the Mail from Specific People, you will click the Choose button to select the people whose messages will be displayed in the search folder.
4. Use the Search Mail In list to select the personal folders file the search folder will search. A search folder can be associated with only one source PST file.
5. Click OK.

FIGURE 18.19

Adding a predefined search folder.

The new search folder is added to the Search Folders folder.

Adding a Custom Search Folder

If the predefined search folders do not meet your needs, you can define a custom search folder:

1. In Mail view, select New from the File menu, then select Search Folder. Outlook displays the New Search Folder dialog box (shown earlier in Figure 18.19).
2. Scroll down and select Create a Custom Search Folder.
3. Click the Choose button to display the Custom Search Folder dialog box (see Figure 18.20).
4. Enter a name for the search folder in the Name box. It is advisable to use a descriptive name.
5. If necessary, click the Browse button to select the personal folders file that this search folder will be connected to.
6. Click the Criteria button to display the Search Folder Criteria dialog box (see Figure 18.21).
7. Use the three tabs in this dialog box to define criteria as follows:
   - On the Messages tab, define criteria that involve words in the message subject or body, the person the message is from or is sent to, and the time of the message.
   - On the More Choices tab, define criteria that involve the message's read status, attachments, importance level, flag status, or size.
   - On the Advanced tab, define criteria that involve custom message fields.
8. When you are finished defining criteria, click OK twice to close all dialog boxes.

FIGURE 18.20

Defining a custom search folder.

Customizing a Search Folder

To customize an existing search folder, right-click it and select Customize from the context menu.

FIGURE 18.21

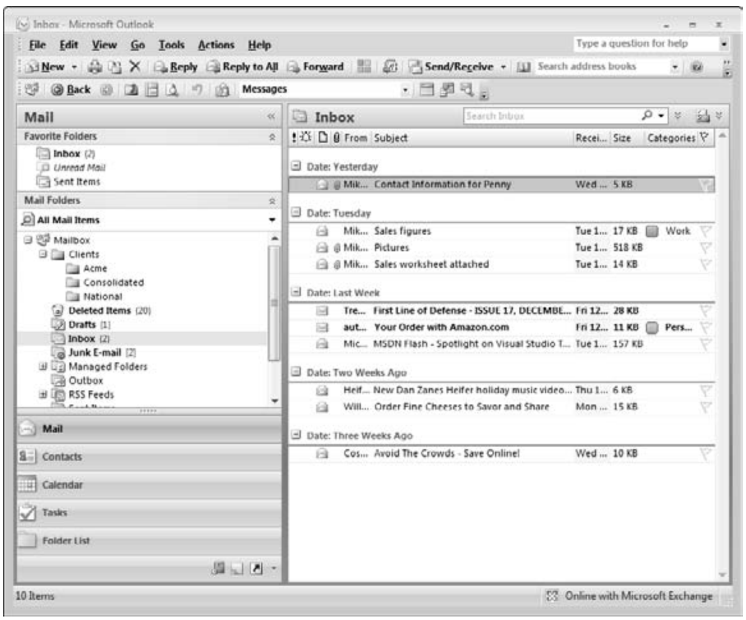
Setting criteria for a custom search folder.

Using Favorite Folders

Many Outlook users have a large number of mail folders, but use only a few of them regularly. To make it easy to get at these frequently used folders, Outlook lets you define Favorite Folders displayed in a separate section of the navigation pane, as shown in Figure 18.22.

FIGURE 18.22

Use the Favorite Folders section to display the mail folders that you use most often.



Can't View Favorite Folders?

Some Outlook users have reported a bug that causes their Favorite Folders and the menu command to display them to both vanish. There is no fix for this at present other than reinstalling Outlook. It should be addressed when Microsoft makes Office updates available.

Actions you can take with Favorite Folders are as follows:

- To turn Favorite Folders display on or off, select Navigation Pane from the View menu and click Favorite Folders on the next menu.
- To add a folder to Favorite Folders, right-click the folder and select Add to Favorite Folders from the popup menu.
- To remove a folder from Favorite Folders, right-click the folder and select Remove From Favorite Folders from the popup menu.
- To change the order of folders in the Favorite Folders list, right-click a folder and select Move Up in List or Move Down in List from the popup menu.

Remember that folders in the Favorite Folders list are not separate from the folders in the regular list. For example, in Figure 18.22 there is still only one Inbox folder but you have two ways to get to it.

Using the Deleted Items Folder

When you delete a folder or an Outlook item, it does not vanish permanently — at least not immediately. Rather, it goes to the Deleted Items folder. This is a safety feature that allows users to recover from accidental deletions. You can "delete" items in the usual way (select them and press Del) or you can drag them to the Deleted Items folder.

When you delete an item from the Deleted Items folder, it is truly gone. Most people prefer to delete items from this folder manually, by selecting one or more items and pressing Del. To delete all items from the Deleted Items folder, select Empty "Deleted Items" Folder from the Tools menu. You can also tell Outlook to automatically empty the Deleted Items folder whenever the program exits as follows:

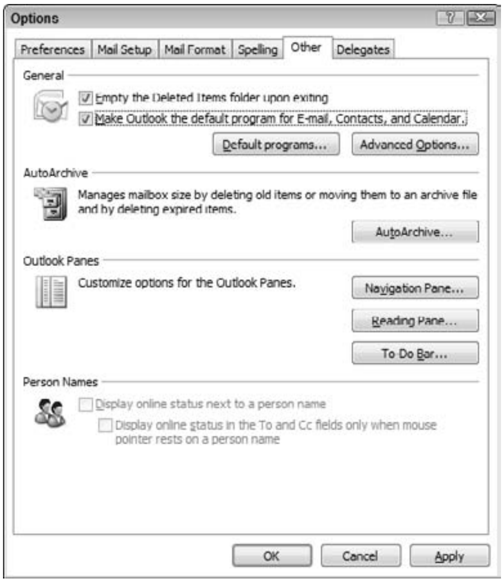
1. Select Options from the Tools menu to open the Options dialog box.
2. Click the Other tab (shown in Figure 18.23).
3. Select the Empty Deleted Items Folder Upon Exiting option.
4. Click OK.

"Undeleting" Items

If an item has not been permanently deleted — that is, if it is still in the Deleted Items folder — you can "undelete" it by moving it back to its original folder (or another folder of the same type).

FIGURE 18.23

Setting options for emptying the Deleted Items folder.



AutoArchiving Outlook Items

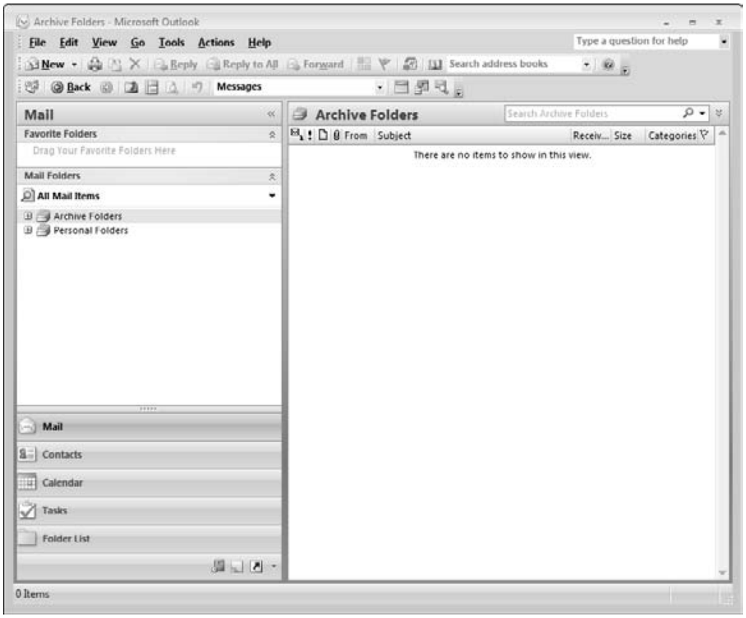
AutoArchive is an Outlook tool that can automatically archive mail messages and other items based on their age. It is based on the premise that there are many Outlook items that you will probably never need but don't want to permanently delete just in case. By moving these items to an archive, they no longer clog up your personal folders but are available when and if you need them. AutoArchive can also permanently delete items that you are sure you will not need again.

Items archived are kept in a separate PST file called, appropriately enough, Archive.PST. It is kept in the same location on your disk as your personal PST file as described earlier in this chapter —

although, unlike the Personal Folders file, you can change this location. After archiving items for the first time, the archive file appears in your folder list along with your personal folders, as shown in Figure 18.24.

FIGURE 18.24

Archived items are stored in their own PST file.



An archive file retains the folder structure of your personal folders file, making it easy to find things.

Deciding What Gets Archived, and When

The archiving process is completely under your control. You do not have to use it at all, but if you do you can decide which folders are archived, how often the archiving process is run, how old an item has to be in order to be archived, and so on. Many of these settings are made in the AutoArchive dialog box, shown in Figure 18.25. To display this dialog box:

1. Select Options from the Tools menu.
2. Click the Other tab.
3. Click the AutoArchive button.

FIGURE 18.25

The AutoArchive dialog box.

Here are the options available in this dialog box:

- **Run AutoArchive Every:** If this option is selected, Outlook will run AutoArchive automatically at the selected interval — the default is 14 days. If this option is not selected, you can run AutoArchive when desired by selecting Archive from the File menu (more on this soon).
- **Prompt Before AutoArchive Runs:** If this option is selected, Outlook will prompt you before AutoArchive runs. Otherwise it will run without notification.
- **Delete Expired Items (E-mail Folders Only):** Specifies that expired email items will be deleted and not moved to the archive file.
- **Archive or Delete Old Items:** Determines whether remaining options in the dialog box are available.
- **Clean Out Items Older Than:** Specifies the age at which items are archived. The default is 6 months.
- **Move Old Items To:** If selected, old items (other than email items) are archived to the specified archive file.
- **Permanently Delete Old Items:** If selected, old items are deleted and not archived.
- **Apply These Settings to All Folders Now:** Use your selected settings for all folders (as opposed to individual archive settings for each folder, as described soon).
- **Retention Policy Information:** Some organizations set retention policies for Outlook items when you are using an Exchange server. See Chapter 28 for more information on using Outlook with an Exchange server.

Setting AutoArchive Options for Individual Folders

You may not want all your Outlook items treated the same as regard to archiving. For example, you may want to keep work-related emails for a longer period than personal emails. You can set AutoArchive options for individual folders (other than Contacts folders) as follows:

1. Right-click the folder.
2. Select Properties from the context menu to display the Properties dialog box for the folder.
3. Click the AutoArchive tab (see Figure 18.26).
4. Set options as described in the previous section.

FIGURE 18.26

Setting AutoArchive options for a single folder.

TIP **It's easy for your PST file to grow to a huge size. In and of itself this is not a problem, but it does slow things down. Deleting unneeded items on a regular basis is a good idea — and I mean permanently deleting them, not just moving them to the Deleted Items folder. But suppose you received a message with a large attachment. You want to keep the message but no longer need the attachment. You can remove the attachment and save space in your PST file by opening the message, right-clicking the attachment, and selecting Remove from the context menu.**

Manually Archiving Outlook Items

You do not have to rely on Outlook's AutoArchive tool to archive your items. You can manually move mail messages and other items from your personal folders to the archive folders, using the techniques explained earlier in this chapter in the section "Moving or Copying Items." Nor do you have to use the archive folders — you can create a separate PST file specifically for backup purposes and move items to it.

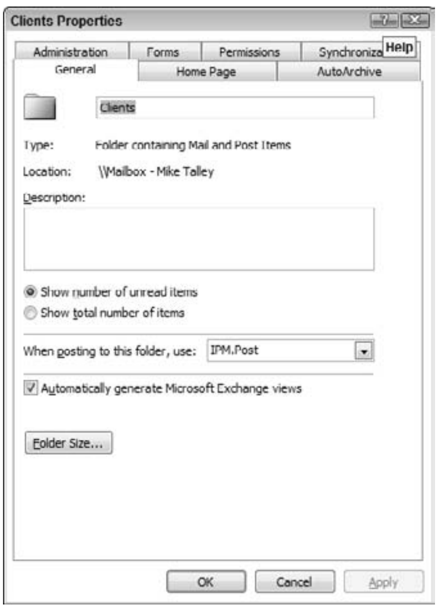
Setting Other Folder Options

Each Outlook folder has a set of options, or properties, that determine certain aspects of the folder's display and operation. Each folder's properties are accessed by right-clicking the folder in the navigation pane and selecting Properties from the context menu. There are some slight differences in the properties you can change depending on the folder. For example, you can change the name of folders that you have created but not of Outlook's default folders such as Inbox and Contacts.

The Properties dialog box has five tabs. The General tab, shown in Figure 18.27, has these settings:

FIGURE 18.27

Setting General properties for a folder.



- **Name:** At the top of the dialog box the folder's name is displayed. You can change this for non-default folders.
- **Description:** Enter an optional description for the folder.
- **Show...:** Select whether the folder displays the number of unread items or the total number of items in parentheses next to its name.
- **When Posting to This Folder, Use:** Use this option to select a form that will be used as the default for postings to this folder.
- **Automatically Generate Microsoft Exchange Views:** Select this option if you want Outlook to automatically create views of public folders that can be viewed by other Exchange users. Relevant for Exchange accounts only.
- **Folder Size:** Click this button to view information on the size of the folder and any subfolders it contains.

The Home Page tab lets you specify a web page that will be displayed as the default view for this folder.

The AutoArchive tab lets you set AutoArchive options for this folder. These are explained elsewhere in this chapter in the section "Setting AutoArchive Options for Individual Folders."

The Administration tab is mostly relevant for Exchange accounts and is covered in detail in Chapter 28. For non-Exchange accounts, most of the items will be grayed out (as in the figure). The one item you can set for non-Exchange folders is the Initial View On Folder, which determines how the folder contents are displayed when the folder is first opened. For example, for a Mail folder you can use the default Normal view or you can select to have items displayed by From, by Subject, and so on.

The Forms tab lets you specify which forms are used with this folder. Forms and setting form options for a folder are covered in detail in Chapter 26.

Backing Up Outlook Data

Losing data is the worst nightmare of most computer users, and given the importance of all the information stored in Outlook, losing your Outlook data is a particularly terrifying possibility. Unless you or your employer has an integrated backup solution in place, I advise you to make the effort to back up your Outlook data regularly. You have several ways to do this.

Internet Calendar Subscriptions

Information about your Internet Calendar subscriptions is kept separately from your Personal Folders file in a file named Internet Calendar Subscriptions.PST.

Automating Backup

Advanced users can write batch files or Windows script files that automate the process of backing up Outlook data. These topics are beyond the scope of this book, but you may want to explore them further on your own. When you automate a task such as backup, you are much less likely to avoid doing it.

Back Up Your Entire PST File

As mentioned previously, all your Outlook data — email messages, contacts, tasks, appointments, account settings, and so on — is by default stored in a personal folders file named Outlook.PST. This file is kept in the following location (where *user* is your Windows logon):

- **Windows XP and Windows Server 2003:** X:\Documents and Settings*user*\Local Settings\Application Data\Microsoft\Outlook
- **Windows Vista:** X:\ *user*\Local Settings\AppData\Microsoft\Outlook

You may have additional PST files as well — Archive.PST if you are using the AutoArchive feature as well as any other personal folders files that you created. Archive.PST is kept in the same default location as Outlook.PST, and any additional personal folders files are stored where you specified.

Backing up these files is simply a matter of making copies in a secure location. Be aware, however, that before you can copy these files you must exit Outlook and any other programs that might access them, such as Windows Messaging or a remote connection to Microsoft Exchange. Then use Windows Explorer or another means to make the copy.

Where should you copy these files to? That depends on your setup and resources. If you are on a network, there may be a location on the network server that you can use for backup. If you have a CD burner, creating backups on CD is an excellent choice. Other options that may be open to you include flash drives and external hard disks.

Summary

Outlook data consists of items such as email messages, appointments, and contacts. These items are organized into folders that are, in most cases, specialized to hold a single type of item. Folders in turn are stored in a Personal Folders file that also contains your account information and other Outlook settings. This chapter showed you how to work with items, folders, and data files to keep your Outlook information organized, accessible, and backed up.

Chapter 19

Customizing Outlook to Suit the Way You Work

IN THIS CHAPTER

- Customizing the screen
- Customizing toolbars
- Customizing the menus
- Defining custom views
- Customizing Outlook Today

No matter how clever a software company is — and Microsoft is plenty clever — there's no way they can design a program that works just the way everyone wants it to. Recognizing this, Microsoft has made Outlook very flexible so that you can change many aspects of how it looks and works to suit you. This is the topic of this chapter.

Please note that customizing Outlook is not the same as setting program options, a topic covered Chapter 7 for email-related options and in other individual chapters as needed. Options affect how the program operates, whereas customization deals primarily with the screen appearance of the program and how you enter commands.

Customizing the Outlook Screen

Outlook provides you with many ways to customize the appearance of the screen.

Changing the Size of Screen Elements

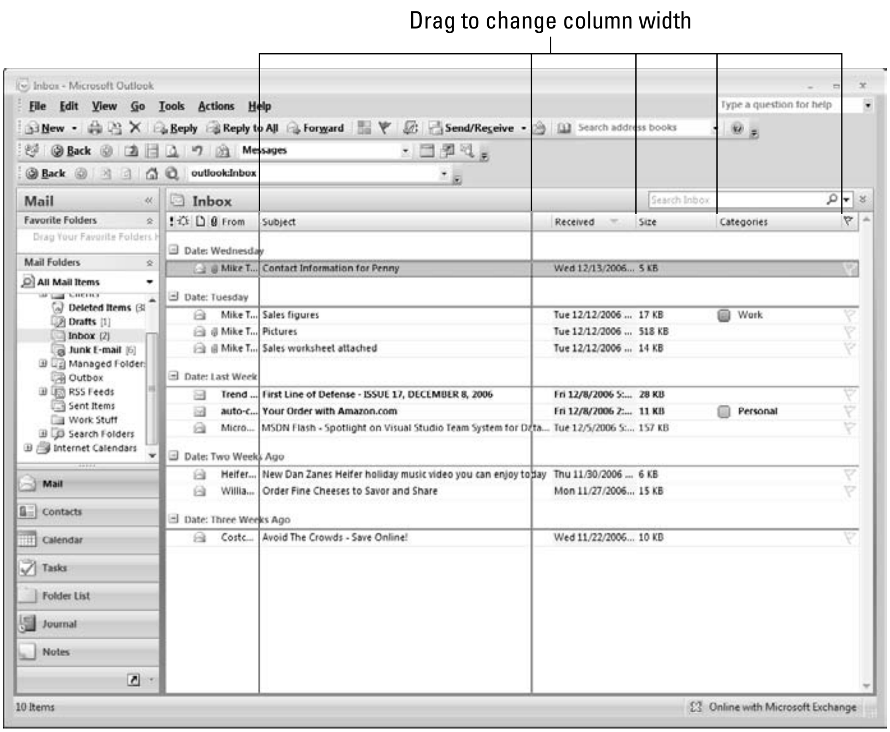
Like any Windows program, you can change the size of the main Outlook window (assuming that it is not maximized to full-screen size) by pointing at a border or corner of the window and dragging to the desired size. You can also change the size of certain elements within the window. When you point at an element that can be dragged to change size, the mouse cursor will change to two parallel lines with arrow heads:

- Drag the right border of the navigation pane to change its width.
- Drag the horizontal border within the navigation pane to allow more or less space for the Mail, Calendar, and other buttons.
- Drag the border between the reading pane and the main window to change their relative sizes.

When the main window is displaying a view that uses columns, you can change the width of a column by pointing at its right border, as shown in Figure 19.1, and dragging to the desired width.

FIGURE 19.1

You can change the width of columns in the main window.



An Easy Switch Between Normal and Minimized

At its top-right corner, the navigation pane displays an arrow that looks like << when the pane is displayed normally and like >> when the pane is minimized. Click this arrow to switch between these two display states.

Customizing the Navigation Pane

The navigation pane can be displayed normal size, minimized, or not at all by selecting Navigation Pane from the View menu and then selecting Normal, Minimized, or Off. On this same menu you can also choose to display or hide two parts of the navigation pane:

- **Current View Pane:** Displays view options you can select (rather than using the menus).
- **Favorite Folders:** Displays your favorite folders (as explained in Chapter 18). Available in Mail view only.

Customizing Other Screen Elements

You can customize the display of other Outlook screen elements as described here:

- The **reading pane** can be displayed at the right or the bottom of the screen or turned off altogether by selecting Reading Pane from the View menu.
- The **To-Do Bar** can be displayed at normal size, minimized, or not displayed at all by selecting To-Do Bar from the View menu. This menu also lets you specify which elements (Date Navigator, Appointments, Task List) are displayed on the To-Do Bar and to set display options.
- The **daily task list** can be displayed at normal size, minimized, or not displayed at all by selecting Daily Task List from the View menu. You can also use this command to specify how the displayed tasks are arranged.

Customizing Toolbars

The applications in the Microsoft Office 2007 suite have almost all gotten away from the traditional menus-and-toolbars user interface in favor of *ribbons*, which I consider to be sort of a sophisticated hybrid between menus and toolbars. Outlook is lagging behind, and for reasons unknown still uses the traditional menus and toolbars in its main screen. Other Outlook windows, such as the ones you see when you open an email message or a task, use ribbons, so Outlook is sort of a mongrel — but it all works perfectly well.

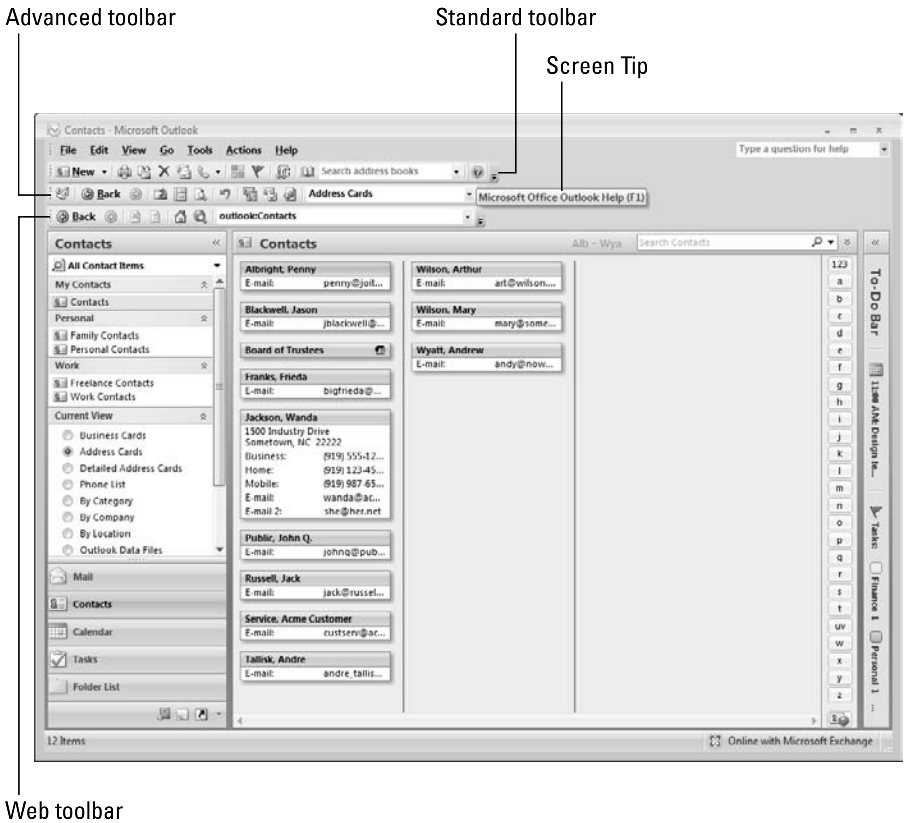
Outlook has three toolbars called the *Standard*, *Web*, and *Advanced* toolbars. They are identified in Figure 19.2. The Standard and Advanced toolbars are *adaptive*, which means the buttons they display change depending on what you are doing in Outlook. Most toolbar buttons are identified by an icon, and if you cannot figure out what the icon means, rest the mouse cursor over a button for a moment to view an informative *ScreenTip*, also shown in the figure.

If you don't need or want the ScreenTips, turn them off as follows:

1. Select Customize from the Tools menu to display the Customize dialog box.
2. Click the Options tab.
3. Turn off the Show ScreenTips on Toolbars option.
4. Click OK.

FIGURE 19.2

Outlook's three toolbars and a ScreenTip.



Hiding and Displaying Toolbars

If you do not want all three — or any — toolbars displayed, right-click any toolbar or in the toolbar area to display the menu shown in Figure 19.3. Click the toolbar names to check (display) or uncheck (hide) them.

Positioning the Toolbars

The toolbars are normally displayed near the top of the screen just under the main menu. You can move a toolbar to another screen location by pointing at the vertical row of dots at the left end of the toolbar. You'll see the mouse cursor change to a four-headed arrow. You can position a toolbar in one of two ways:

- **Docked:** If you drag the toolbar to any of the four edges of the Outlook window, it will dock in position along that edge.
- **Floating:** If you drag the toolbar to any other screen location, it will "float" at that position. You move a floating toolbar by dragging its title bar.

Figure 19.4 shows Outlook with the Web toolbar floating and the Advanced toolbar docked at the top of the Outlook window.

FIGURE 19.3

You can display or hide Outlook's toolbars as desired.

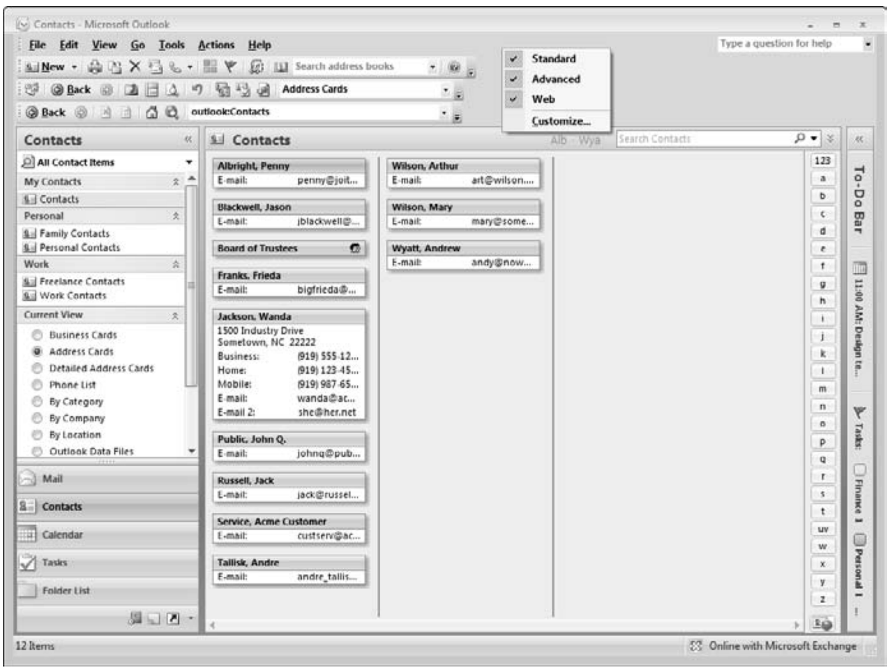
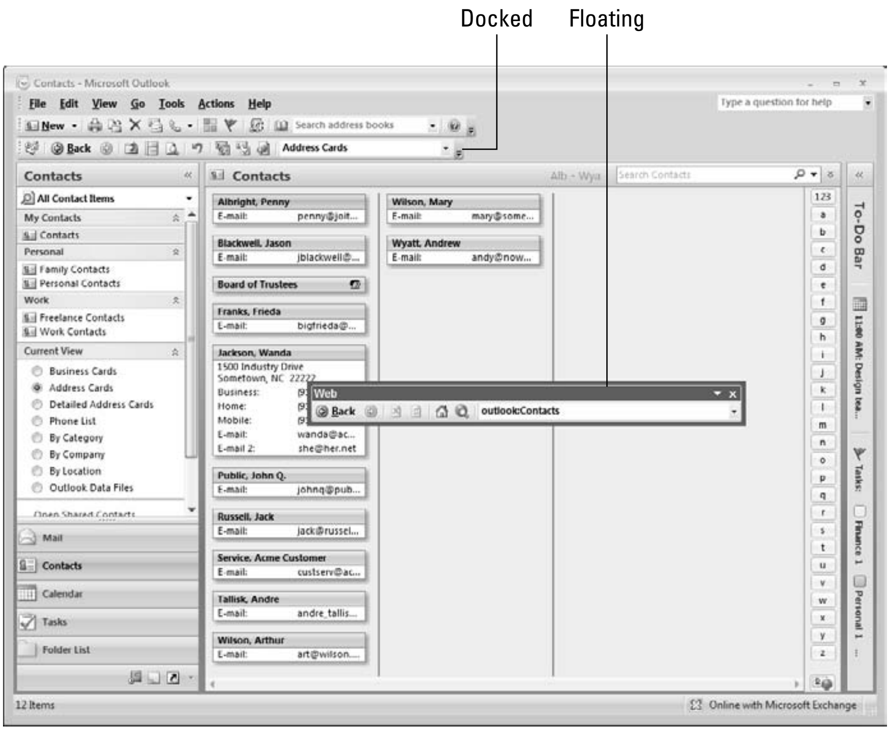


FIGURE 19.4

Outlook's toolbars can float or be docked along any edge of the program window.



Adding and Removing Toolbar Buttons

Each of the three Outlook toolbars has a set of buttons it can display. When first installed, Outlook displays all these buttons on each toolbar. If there's a button you never use, you can remove it to save screen space. You can always add it back later. Here are the steps to follow:

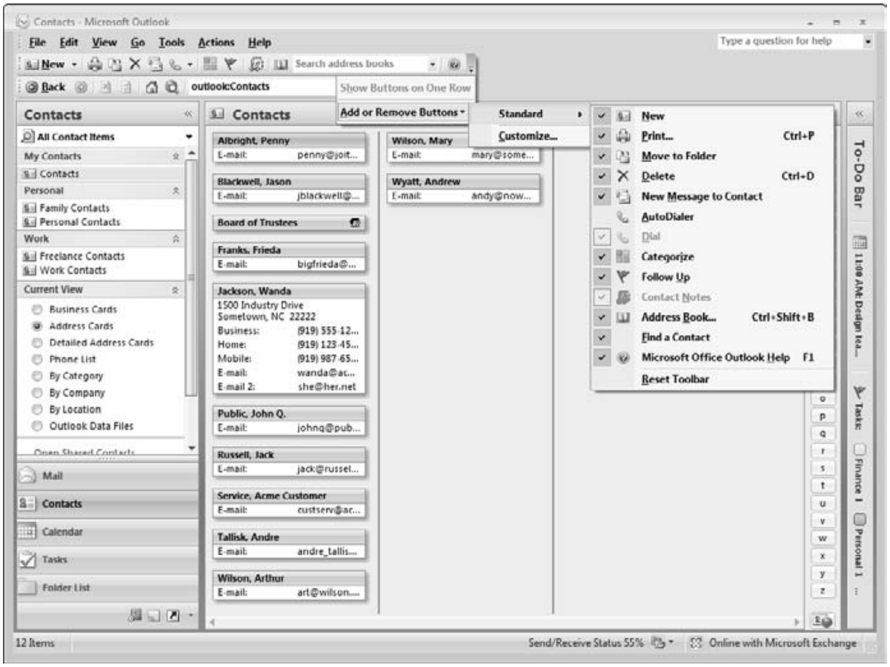
1. Click the arrow at the right end of the toolbar that you want to customize.
2. Select Add or Remove Buttons.
3. Select the name of the toolbar. Outlook displays a list of available buttons as shown in Figure 19.5.
4. Click a button in this list to check or uncheck it. Click Reset Toolbar to return the toolbar to its default set of buttons.
5. When finished, press Esc or click anywhere outside the button list.

Viewing Hidden Toolbar Buttons

If the Outlook window is narrower than a toolbar, some of the toolbar buttons will be hidden. To access these buttons, click the arrow at the right end of the toolbar. Two small dots will be displayed above this arrow if there are any hidden buttons.

FIGURE 19.5

Specifying which buttons a toolbar displays.

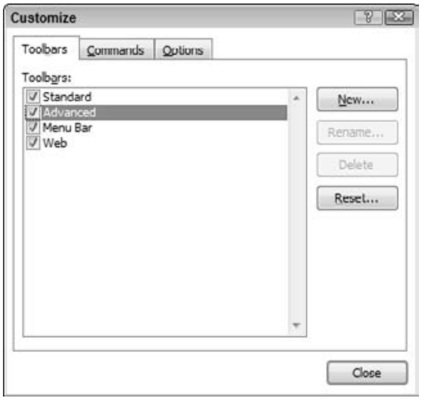


Advanced Toolbar Customization

You can go beyond hiding or showing a toolbar's default buttons to adding essentially any Outlook command to a toolbar and even creating new, custom toolbars. To do so, click the arrow at the right end of any toolbar, select Add or Remove Buttons, and then select Customize. You can also select Customize from the Tools menu. Outlook displays the Customize dialog box. The Toolbars tab of this dialog box is shown in Figure 19.6. It lists the three default toolbars, the Menu Bar (which corresponds to the main menu), and any custom toolbars that exist.

FIGURE 19.6

The Toolbars tab of the Customize dialog box.



On the Toolbars tab you can:

- Hide or display a toolbar by checking or unchecking it (but you cannot hide the Menu Bar).
- Create a new toolbar by clicking New and typing in the name of the toolbar. Outlook displays the new toolbar, which is empty, and you add commands to it as I describe soon.
- Delete or rename a custom toolbar.
- Reset a default toolbar to its original complement of buttons.

While the Customize dialog box is open, you can add, remove, and move toolbar buttons using drag and drop. If you want to add new buttons, you must display the Commands tab of this dialog box, shown in Figure 19.7. This dialog box lists all of Outlook's commands, organized by category. Here's what you can do; these actions include any new, empty toolbar that you may have created:

- **To move a button from one toolbar to another**, drag it from the old toolbar and drop it on the new toolbar. A vertical black line shows where the button will be placed before you drop it.
- **To move a button to a new location on the same toolbar**, drag and drop it.
- **To place a new command on a toolbar**, drag it from the list of commands in the Customize dialog box and drop it in the desired location.
- **To remove a command from a toolbar**, drag it off the toolbar and drop it anywhere away from the toolbars.

When you are finished, click the Close button to close the Customize dialog box.

FIGURE 19.7

The Commands tab of the Customize dialog box.

Customizing Menus

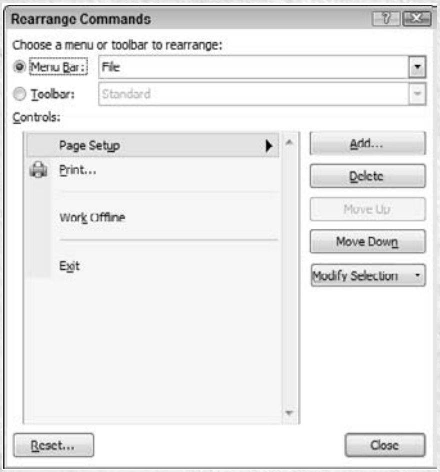
Outlook's main menu is a special type of toolbar, called the *Menu Bar*. It too can be customized although the procedures are slightly different than for toolbars:

1. Display the Customize dialog box by selecting Customize from the Tools menu.
2. Click the Commands tab.
3. Click the menu you want to customize (on the actual Menu Bar, not in the dialog box). The menu opens. Then:
   - To move a command from one menu to another, drag it from the old menu to the new (which opens) and then drop it in the desired position.
   - To move a command to a new position on the same menu, drag it to the new position.
   - To place a new command on the menu, drag it from the Commands list in the Customize dialog box to the desired position on the menu.
   - To remove a command from the menu, drag it off the menu and drop it somewhere else away from the menus.
4. When finished, click Close to close the Customize dialog box.

Another Way to Rearrange Commands

You can also rearrange commands on menus and toolbars by clicking the Rearrange Commands button on the Commands tab of the Customize dialog box. Outlook displays the Rearrange Commands dialog box. Then:

1. If you want to rearrange commands on a menu, select the Menu Bar option then select the desired menu in the adjacent list. If you want to rearrange commands on a toolbar, select the Toolbar option then select the desired toolbar in the adjacent list. The commands on the selected element are displayed in the Controls list.
2. Select an existing command.
3. Use the buttons to add a new command, delete the selected command, or move the selected command up or down in the list.
4. Click Reset to return the toolbar or menu to its default set and order of commands.
5. Click Close when you are finished.



The Rearrange Commands dialog box.

WARNING **Given that Outlook provides you with great flexibility when it comes to customizing your menus, it can be tempting to spend a lot of time doing so. But is this really a good idea? Windows programs, particularly those from Microsoft, tend to follow the same general menu organization. Of course, different programs do not have the same menu commands, but there are quite a few common commands that people expect to find in a certain location within the menu structure. Do you want your copy of Outlook to be different? Also, what will happen if you have to use Outlook on another system? The menus will be different from your customized ones and may be hard to use. Think twice before making any significant changes to the menus.**

Other Customization Options

When you display the Customize dialog box (select Customize from the Tools menu), there is a third tab called *Options*, as shown in Figure 19.8. The options on this tab are as follows:

- **Always Show Full Menus:** If this option is selected, Outlook always shows the full menu as soon as the menu title is clicked on the Menu Bar. Otherwise, Outlook displays an abbreviated menu with the most frequently used commands and shows the full menu only if you click the arrow at the bottom of the abbreviated menu (see Figure 19.9).
- **Show Full Menus After a Short Delay:** If Always Show Full Menus is turned off, you can select this option to have Outlook display the full menu after a short delay.
- **Reset Menu and Toolbar Usage Data:** Outlook keeps track of which menu commands you use most often and uses this information to determine which commands are displayed on abbreviated menus. Click this button to reset your usage data.
- **Large Icons:** Select this option to display larger icons on toolbars.
- **List Font Names in Their Font:** If this option is selected, then when selecting fonts, the font names will be displayed in the actual font.
- **Show ScreenTips on Toolbars:** This option determines whether a ScreenTip displays when the mouse cursor is hovered over a toolbar button.
- **Show Shortcut Keys in ScreenTips:** If this option is selected, a ScreenTip for a toolbar button will also display the shortcut key (if there is one) assigned to that command.
- **Menu Animations:** Use this option to select how Outlook animates opening and closing menus.

FIGURE 19.8

Setting other customization options.

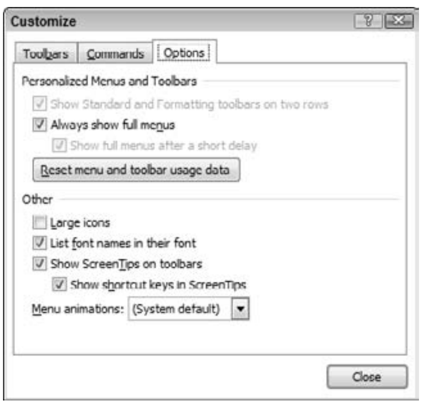
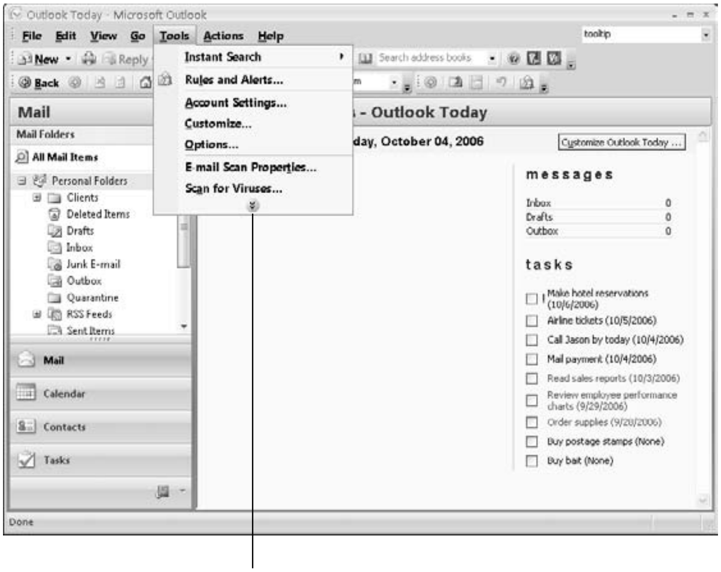


FIGURE 19.9

Click the arrow to display the full menu.



Click here to display full menu

Defining Custom Views

In Outlook, you may be viewing mail, contacts, tasks, or any of the other kinds of information that Outlook supports. Regardless of what you are viewing, the Current View command on the View menu lists a selection of predefined views you can use. For example, when viewing mail you can view mail for the last seven days, unread messages, and so on.

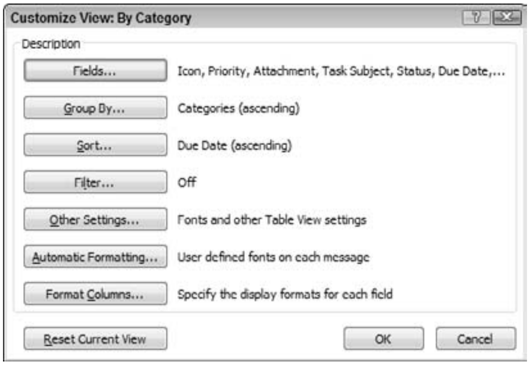
In addition to the predefined views, the Current View menu also has two other commands, Customize Current View and Define Views. These commands let you make modifications to the predefined views and also to define your own custom views.

Customizing the Current View

When you select Current View from the View menu and then select Customize Current View, Outlook displays the dialog box shown in Figure 19.10. The title of the dialog box displays “Customize View *XXXX*”, where *XXXX* is the name of the current view — By Category in the figure.

FIGURE 19.10

The Customize View dialog box.



You can see there are seven buttons that provide access to additional dialog boxes that let you customize specific aspects of the view. Be aware that for some views, not all these buttons are available (they are grayed out). This is because some views are more flexible than others and allow for greater customization. The following sections look at these choices in turn. Remember the examples shown in the figures are for a specific view — the By Category view for Tasks. When you are customizing a different view things are likely to look different.

Fields

The Show Fields dialog box, shown in Figure 19.11, lets you specify which *fields*, or pieces of information, are included in the view. The left side of the dialog box lists the fields that are available, and the right side lists those that are part of the view definition. You use the Add and Remove buttons to move fields from one list to the other, and the Move Up and Move Down buttons to change the order of fields in the view.

Group By

The Group By dialog box, shown in Figure 19.12, lets you determine how items are grouped in the view. Most views that use grouping will group on a single field — for example, Category. You can also define subgroups if you want to use the Then By section of this dialog box.

FIGURE 19.11

The Show Fields dialog box lets you specify which fields are included in the view.

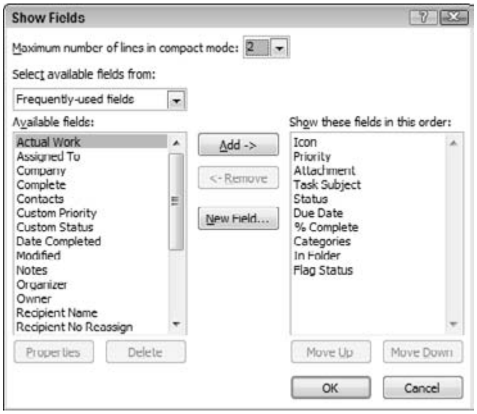
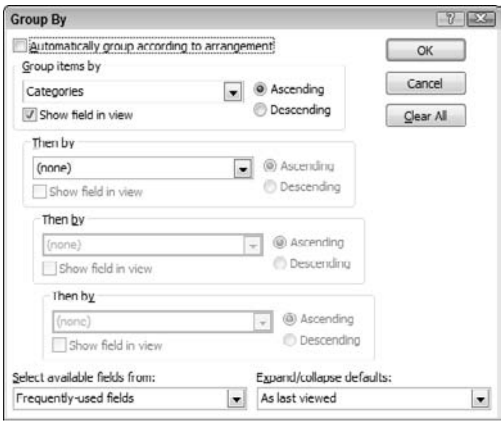


FIGURE 19.12

The Group By dialog box lets you specify how items are grouped in the view.

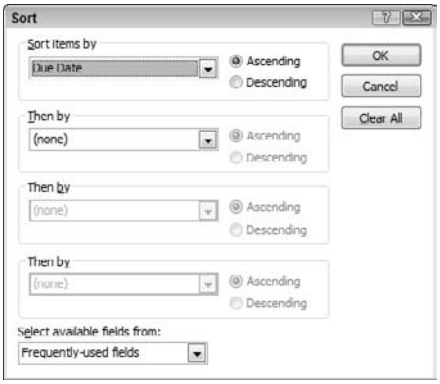


Sort

The Sort dialog box (see Figure 19.13) lets you specify how items are sorted in the view. If the items are grouped, the sorting is applied within each defined group.

FIGURE 19.13

The Sort dialog box lets you specify how items are sorted in the view.

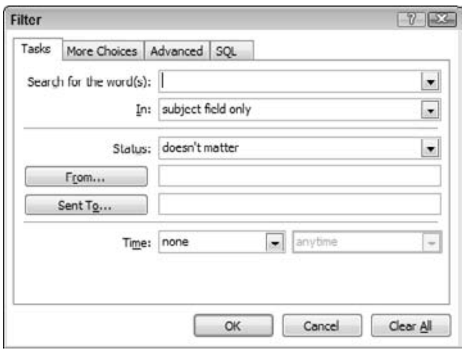


Filter

The Filter dialog box, shown in Figure 19.14, lets you define a filter that will be applied to the view. When a filter is in effect, only those items that meet your defined criteria are displayed.

FIGURE 19.14

The Filter dialog box lets you define criteria for which items are shown in the view.



Other Settings

The Other Settings dialog box, shown in Figure 19.15, is used to control miscellaneous settings for the view, such as the font used, the appearance of gridlines, and the way AutoPreview works.

FIGURE 19.15

The Other Settings dialog box controls fonts, gridlines, and other miscellaneous aspects of the view.

Automatic Formatting

The Automatic Formatting dialog box, shown in Figure 19.16, lets you define automatic formatting that will be applied to items in the view. You can, for example, specify that completed tasks are displayed using a strikethrough font and that overdue tasks are displayed in a red font.

FIGURE 19.16

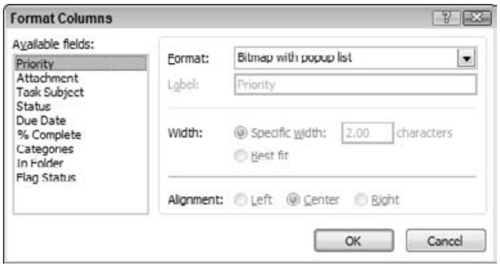
The Automatic Formatting dialog box lets you define automatic formatting that will be applied to items in the view.

Format Columns

The Format Columns dialog box, shown in Figure 19.17, is used to specify the display format for columns in the view. For example, a column that displays a date could be formatted to display as 12/22/06, 22-Dec-06, or December 22, 2006 (among others). You can also specify the alignment and label for each column.

FIGURE 19.17

The Format Columns dialog box lets you specify the display format for individual columns in the view.



Reset Current View

Click this button to return the current view to its default settings.

Customizing Outlook Today

Outlook Today is the default home page for Personal Folders (you learned about specifying a home page for folders in Chapter 18). It provides a summary of important information, such as unread mail messages, tasks with upcoming due dates, and the next few days in your calendar. You can customize Outlook Today as follows:

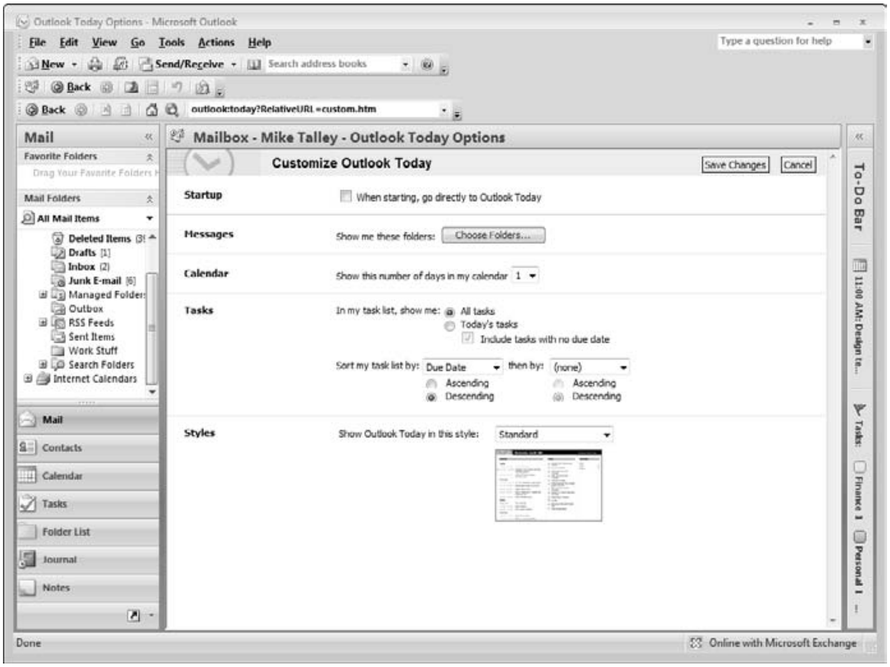
1. Display Outlook Today.
2. Click the Customize Outlook Today button at the top right of the window. Outlook opens Customize Outlook Today in the main window (see Figure 19.18).
3. Make changes as follows:
   - **When Starting . . . :** If this option is selected, Outlook automatically displays Outlook Today when the program starts.
   - **Messages:** Click Choose Folders to specify which folders have their messages summarized in Outlook Today.

- **Calendar:** Specify how many days of your calendar are shown in Outlook Today.
- **Tasks:** Specify which tasks are shown and how they are sorted.
- **Styles:** Choose a display style for Outlook Today.

4. Click Save Changes.

FIGURE 19.18

Customizing Outlook Today.



Summary

No two people are alike, or so they say, so why should we all have to use exactly the same Outlook? With the many customization options available to you, you can set up Outlook's screen, toolbars, menus, and views to suit you and the way you work.

Chapter 20

Managing Security Issues

IN THIS CHAPTER

- Protecting against viruses
- Understanding Outlook's attachment blocking
- Implementing macro security
- Using certificates and digital signatures
- Encrypting and digitally signing messages

Computer security has unfortunately become a very important topic. With the almost universal use of the Internet and email, it's easier than ever for various kinds of malicious software such as viruses to spread. Security issues also include message privacy and verification of people's identities. Because email is the favored means of spreading such malware, Outlook users have to be particularly vigilant. This chapter explains the various tools that Outlook provides to enhance your security.

Protecting Against Viruses

Everyone has heard about *viruses*, those malicious software elements that infect and harm computer systems. Viruses range from the merely annoying to the truly disastrous, but they all have one thing in common — you do not want them on your system! Because viruses often spread by means of email, Outlook provides you with some defenses against them.

It's important to understand that Outlook itself does not have any anti-virus capabilities. An *anti-virus program* is specialized to detect and remove viruses and will have a way to automatically download the latest virus definitions so it can stay up to date. Symantec, Zone Alarm, and McAfee are three of the better-known publishers of anti-virus software. Most systems have anti-virus software installed, and part of protecting yourself against viruses that come with email is to make sure your anti-virus program is configured properly. Specifically, you should set the anti-virus program's options so that it always scans incoming email and attachments for viruses before they get to Outlook. It's also advisable to set the program to scan outgoing email and attachments to prevent you from inadvertently spreading a virus that you have been infected with through other means (such as a floppy disk).

A Virus By Any Other Name

Technically, a *virus* is a piece of software that not only infects a computer system but actively spreads itself to other systems by means of a host file, much like the biological viruses that cause colds and other human illnesses. The term is often used more broadly to include other kinds of "malware" — a generic term for harmful software — that do not fit the strict definition of a virus, such as worms and Trojan horses.

On-Demand Email Scan

If you have an Outlook-compatible anti-virus program installed, you will find two virus-related commands on Outlook's Tools menu:

- **Scan for Viruses:** Opens your anti-virus program and performs an immediate virus scan of email items according to the program options. Use this command when you are not sure that the anti-virus program's automatic scanning is enough.
- **Email Scan Properties:** Opens your anti-virus program's Options dialog box where you can specify the details of how the program scans email items for viruses.

The details of how the virus scan works and how you set options will depend on the specific anti-virus program that you have installed. Please refer to that program's documentation for more information.

Dealing with Attachments

One of the most common ways for viruses to spread is by means of email attachments. However, all attachments are not equal in their ability to spread a virus. Certain file types are potentially very dangerous, such as executable programs, batch files, and installation files. Others, such as image and music files, are generally safe.

Reassuring Email Recipients

People worry about getting viruses via email, and I think it's a good idea to reassure them messages from you are safe. I include a brief note at the bottom of every email I send that states "This email message and any attachments have been scanned for viruses by XXX" (where XXX is the name of the anti-virus program that I use.

Protection Against Phishing Attacks

Phishing is a technique where you receive an email that appears to be from a legitimate company that you do business with, perhaps an online payment service such as PayPal. The message asks you to click a link to go to the company's web site to renew your password or some such thing. Though the site looks legitimate, it is in fact a cleverly designed front that lets unscrupulous people get hold of your password. Outlook provides anti-phishing protections that are covered in Chapter 8 along with other methods for dealing with junk email.

Automatically Blocked Attachments

Because of the potential danger posed by some file types, Outlook blocks certain kinds of attachments sent to you — you receive the message with a notification that an unsafe attachment has been blocked. This blocking is built in to Outlook and cannot be turned off or changed. The blocked file types are listed in Table 20.1.

Outlook also catches these file types on the way out — that is, if you try to send them as an attachment. They aren't necessarily blocked, but Outlook reminds you that the recipient — particularly if they too use Outlook — will not be able to receive them and asks you if you want to proceed.

TABLE 20.1

File Types Blocked by Outlook

Extension	File Type
.ADE	Access Project Extension (Microsoft)
.ADP	Access project (Microsoft)
.APP	Executable application
.ASP	Active Server Page
.BAS	BASIC source code
.BAT	Batch processing
.CER	Internet Security Certificate file
.CHM	Compiled HTML help
.CMD	DOS CP/M command file, or a command file for Windows NT
.COM	Command
.CPL	Windows Control Panel Extension (Microsoft)
.CRT	Certificate file

continued

TABLE 20.1 *(continued)*

Extension	File Type
.CSH	csh script
.DER	DER encoded X509 certificate file
.EXE	Executable file
.FXP	FoxPro compiled source (Microsoft)
.HLP	Windows Help file
.HTA	Hypertext application
.INF	Information or Setup file
.INS	IIS Internet Communications settings (Microsoft)
.ISP	IIS Internet Service Provider settings (Microsoft)
.ITS	Internet Document Set, Internet Translation
.JS	JavaScript source code
.JSE	JScript encoded script file
.KSH	UNIX shell script
.LNK	Windows Shortcut file
.MAD	Access Module shortcut (Microsoft)
.MAF	Access (Microsoft)
.MAG	Access diagram shortcut (Microsoft)
.MAM	Access macro shortcut (Microsoft)
.MAQ	Access query shortcut (Microsoft)
.MAR	Access report shortcut (Microsoft)
.MAS	Access Stored Procedures (Microsoft)
.MAT	Access table shortcut (Microsoft)
.MAU	Media Attachment Unit
.MAV	Access view shortcut (Microsoft)
.MAW	Access Data Access Page (Microsoft)
.MDA	Access Add-in (Microsoft), MDA Access 2 Workgroup (Microsoft)
.MDB	Access Application (Microsoft), MDB Access Database (Microsoft)
.MDE	Access MDE database file (Microsoft)
.MDT	Access Add-in Data (Microsoft)
.MDW	Access Workgroup Information (Microsoft)
.MDZ	Access Wizard Template (Microsoft)
.MSC	Microsoft Management Console Snap-in control file (Microsoft)

Extension	File Type
.MSH	Microsoft Shell
.MSH1	Microsoft Shell
.MSH2	Microsoft Shell
.MSHXML	Microsoft Shell
.MSH1XML	Microsoft Shell
.MSH2XML	Microsoft Shell
.MSI	Windows Installer File (Microsoft)
.MSP	Windows Installer Update
.MST	Windows SDK Setup Transform Script
.OPS	Office Profile settings file
.PCD	Visual Test (Microsoft)
.PIF	Windows Program Information file (Microsoft)
.PLG	Developer Studio Build Log
.PRF	Windows System file
.PRG	Program file
.PST	Exchange Address Book file, Outlook Personal Folder File (Microsoft)
.REG	Registration Information/Key for Registry Data File
.SCF	Windows Explorer command
.SCR	Windows screen saver
.SCT	Windows Script component, FoxPro screen (Microsoft)
.SHB	Windows Shortcut into a document
.SHS	Shell Scrap Object file
.TMP	Temporary file/folder
.URL	Internet location
.VB	VBScript file or any VisualBasic source
.VBE	VBScript encoded script file
.VBS	VBScript script file, Visual Basic for Applications script
.VSMACROS	Visual Studio .NET binary-based macro project (Microsoft)
.VSW	Visio workspace file (Microsoft)
.WS	Windows script file
.WSC	Windows script component
.WSF	Windows script file
.WSH	Windows Script Host settings file

Blocked File Types and Exchange

If you use an Exchange account for email, these same file types are blocked by default. However, the Exchange administrator can modify the list if needed.

Other Attachment Types

Some other file types are not on the blocked list even though they have the potential to carry viruses. The reason these file types are not blocked is because they are very commonly sent as attachments. They include Microsoft Word documents (*.DOC), Excel workbooks (*.XLS), and PowerPoint files (*.PPT). When you receive this kind of file as an attachment, it's important for you to be aware of the potential for harm. Even if you have anti-virus software, you cannot be sure it will catch every virus, particularly because new ones are being created regularly.

The general rule of thumb is to not open any such file unless you trust the source. It is also wise to have macro security set to a safe level, as described elsewhere in this chapter.

Sending Blocked File Types

Many people have perfectly legitimate reasons for sending blocked file types as attachments. There are two ways you can get around Outlook's restrictions to do this:

- **Change the file's extension.** For example, if you want to forward a compiled HTML help file named MyHelp.CHM, change the file extension to something that Outlook will not block, such as MyHelp.TXT. In your message, instruct the file recipient to change the file extension back before using the file.
- **Put the file in a ZIP or other kind of archive.** This kind of file is permitted by Outlook. You need to instruct the recipient as to how the file can be extracted, of course.

Sending ZIP Files as Attachments

When you create a ZIP file, you have the option of protecting it with a password. Although this can provide security against unauthorized access to the ZIP file's contents, it can prevent anti-virus software from checking the ZIP file's contents for viruses.

Macro Security

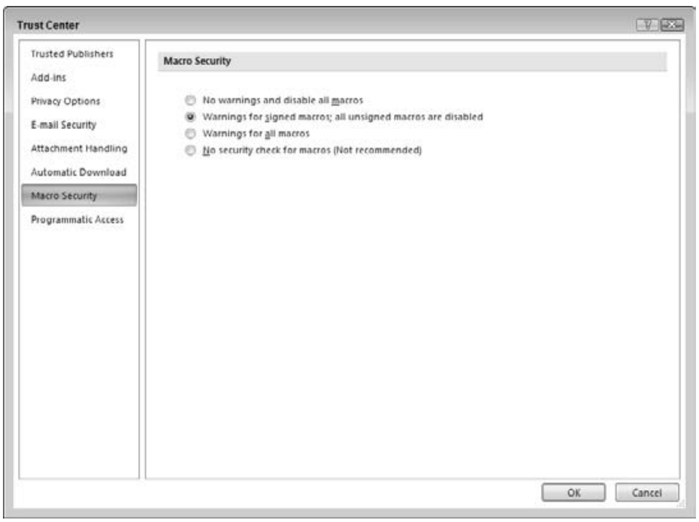
A *macro* is a sequence of program commands that have been recorded and saved and can be executed with a single command. Outlook has its own macro capabilities, as is covered in Chapter 22. More germane to the topic of security, however, are the macros in programs such as Microsoft Word and Excel. Such macros are part of the document file and as such will be included when the file is sent as an email attachment. A malicious macro can be set to execute automatically when the file is opened, and has the potential to wreak havoc on your system and data files. Such viruses are called *macro viruses*.

Anti-virus programs catch most macro viruses, and the precaution of not opening attachments from unknown sources is another layer of protection. The final layer of protection against macro viruses is the macro security level in your programs.

Macro security applies to all Office programs, and it is set in the Trust Center. The *Trust Center* is an Office component, not specifically part of Outlook or any other any program. On Outlook, you access the Trust Center by selecting Trust Center from the Tools menu. Then, in the list on the left, click Macro Security. The Macro Security screen is shown in Figure 20.1.

FIGURE 20.1

Setting macro security in the Trust Center.



You can see that the options mention signed macros. *Digital signing* is a way that the person who creates a macro can “sign” it so the recipient can be assured that it comes from a trusted source. You learn more about digital signatures later in this chapter. You can choose from four levels of macro security, described here from the strictest to the least strict:

- **No Warnings and Disable All Macros:** No macros, whether signed or not, are ever run.
- **Warnings for Signed Macros; Unsigned Macros Are Disabled:** For a signed macro, the program displays a warning and asks you if it should be run. Unsigned macros are never run. This is the default macro security level.
- **Warnings for All Macros:** The program displays a warning for any macro, signed or unsigned, and asks you if it should be run.
- **No Security Check for Macros:** All macros are run without a warning. For reasons probably obvious, this level is not recommended.

It is recommended to maintain the default level of macro security for all Office programs. You can always set a lower level temporarily if you want to run some unsigned macros from a trusted source.

Using Certificates and Digital Signatures

A *certificate*, also known as a *digital ID*, provides a higher level of security with Outlook. You can use a certificate to send encrypted emails so that only the intended recipient can view the contents. You can also use them to sign messages to prevent tampering and prove your identity. Finally, you can use a digital ID in lieu of a username and password to access certain restricted web sites, although this use is not relevant to Outlook.

Digital IDs are based on the technique of a *public/private key pair*. These are two long numbers related to each other. You can use either key of the pair to encrypt data, and only people who have the other key of the pair are able to unencrypt the data. When you have a digital signature, you keep your private key secret and make your public key freely available. Then, here’s how it works:

- To send an encrypted message to someone, you use their public key to encrypt it. Only they can unencrypt the message because no one else has their private key.
- To prove your identity, encrypt some data using your private key. When the recipient of a message decrypts the data using your public key, if the data is intact they will know you must have encrypted it because nobody else has your private key.

Digital certificates have expiration dates, typically one year after they are issued.

Obtaining a Digital ID

If you are using Outlook at work, your employer may provide a digital ID to you which you’ll import as described in the next section. Otherwise, you can get your own. Digital IDs are provided

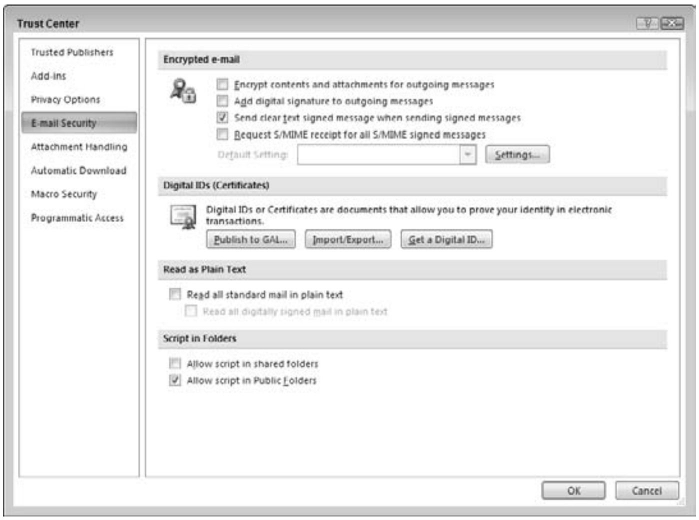
by independent companies for a small fee. A digital ID is linked to a specific email address and cannot be used with other addresses.

To get your own digital ID:

1. Select Trust Center from the Tools menu to open the Trust Center.
2. Click Email Security in the list on the left to display the E-mail Security page (see Figure 20.2).
3. Click the Get a Digital ID button. Your web browser opens and displays a Microsoft page listing companies selling digital IDs.
4. Select the company you want and follow the prompts to register for and pay for your digital ID.

FIGURE 20.2

Using the Trust Center to get a digital ID.



After you complete the ordering process, the issuing company will send you an email containing instructions for installing the digital ID.

Importing/Exporting Digital IDs

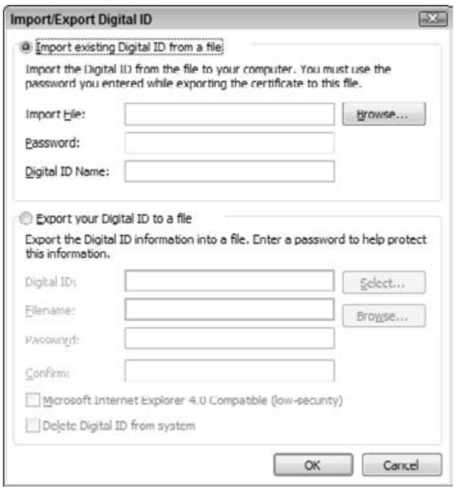
Digital IDs can be provided to you in a file as well as obtained over the Web as described in the previous section. Your employer may provide you with an ID in a file, and you can also export an existing ID to a file for backup purposes. These files are password-protected for security reasons.

To import a digital ID:

1. Select Trust Center from the Tools menu to open the Trust Center.
2. Select E-mail Security from the list on the left.
3. Under Digital IDs, click the Import/Export button to display the Import/Export Digital ID dialog box (see Figure 20.3).
4. Select the Import Existing Digital ID option.
5. Enter the name of the file in the Import File box, or use the Browse button to locate it. Digital ID files have the .EPF, PFX, or .P12 extension.
6. Enter the file password in the Password box.
7. Enter a name of your choosing for the certificate in the Digital ID Name box.
8. Click OK.

FIGURE 20.3

The Import/Export Digital ID dialog box.



Exporting a digital ID uses the same dialog box except that you must select the Export option. Then:

1. If you have more than one digital ID, use the Select button to choose the ID to export.
2. Enter the export filename in the Filename box, or use the Browse button to select an export location.
3. Enter and confirm the password in the boxes provided.

4. Select the Microsoft Internet Explorer 4.0 Compatible option only if you will use the exported ID with older versions of Internet Explorer.
5. Select Delete Digital ID from System if you want to completely delete the ID rather than export it.
6. Click OK.

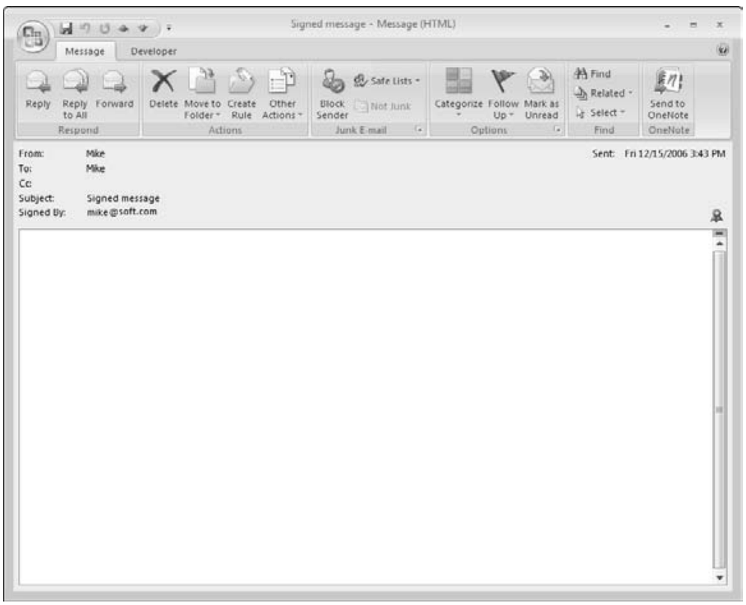
Receiving Digitally Signed Messages

When you receive a digitally signed message, the only difference is that the message says “Signed By *XXXX*” (where *XXXX* is the sender’s email address) in the header, just below the subject line. You can use such a message to add the sender’s public key to your Contacts list, as explained in the next section.

Just because a message is signed does not mean that the signature is legitimate. On the same line as the “Signed By *XXXX*” is displayed, Outlook displays a red ribbon icon as shown in Figure 20.4 to indicate the signature is valid. If the signature is not valid, the message “There are problems with the signature” is displayed, and you can click a button to view the details. A digital signature could be invalid because it has expired, the issuing authority has revoked it, or the server that verifies the certificate is invalid.

FIGURE 20.4

This icon indicates that the digital signature in a message is valid.



Obtaining Other People's Public Keys

To send an encrypted message to someone, you must have their public key. You can get this from a signed message the person sent you. Their certificate is added to their entry in Contacts, and is available for you to use to send encrypted email:

1. Open the digitally signed message.
2. Right-click the sender's name or address in the From box.
3. Select Add to Outlook Contacts from the context menu.
4. If the contact already exists in your Contacts folder, Outlook will notify you. Select Update Information of Selected Contact.

You can view a contact's certificates by opening the contact and clicking the Certificates button in the Show section of the ribbon. Outlook displays a list of the contact's certificates, if there are any, as shown in Figure 20.5. You can take the following actions by clicking the buttons at the right side of this window:

- **Properties:** View the certificate details, including the name of the issuing company and its expiration date.
- **Set as Default:** If the contact has more than one certificate, this command sets the one that will be used as the default for encrypting messages to the contact.
- **Import:** This option lets you import a person's certificate from a file. Certificate files have the .P7C or .CER extension.
- **Export:** This option lets you export the certificate to a file. This can be useful when you want to transfer a contact's certificate to another computer.
- **Remove:** This option deletes the certificate from the contact information.

Encrypting and Digitally Signing Messages

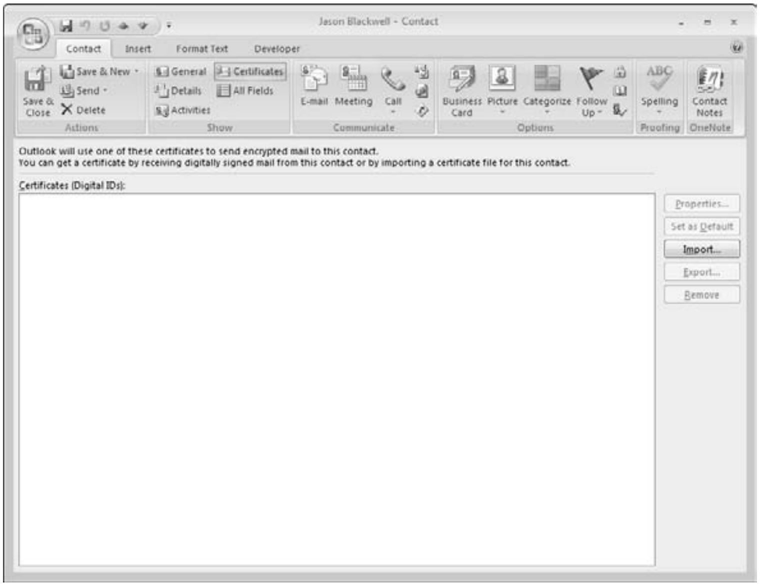
It's important to understand that encrypting a message and signing a message are two different things:

- **Encrypting** uses the recipient's public key to encrypt the message and attachments so that only the recipient can read them.
- **Signing** uses your digital ID to mark a message so that recipients can verify that it really came from you.

A message can be signed, encrypted, or both.

FIGURE 20.5

Viewing a contact's digital certificates.



Encrypting Messages

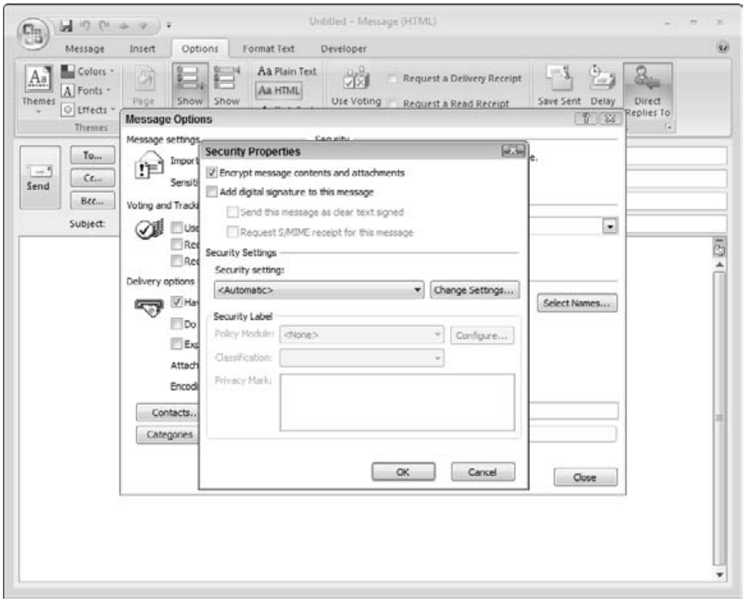
You can send an encrypted message to anyone for whom you have the public key — in other words, you have their certificate as part of their contact information. You can encrypt single messages or specify that all messages be encrypted (when possible).

To encrypt a single message:

1. Create the new message.
2. Click the arrow in the Options section of the Message ribbon to display the Message Options dialog box.
3. Click the Security Settings button to open the Security Properties dialog box (see Figure 20.6).
4. Select the Encrypt Message Contents and Attachments option.
5. Click OK, then click Close, to return to the message.
6. Compose and send the message as usual.

FIGURE 20.6

The Security Properties dialog box.



Of course, a message can be encrypted only when it is going to one or more recipients for whom you have a certificate. If you request encryption for a message going to people for whom you do not have a certificate, Outlook displays a message and gives you the option of sending the message without encryption.

You can also tell Outlook to encrypt all outgoing messages and attachments. Of course, this affects only messages that you send to people whose public key you have.

1. Select Trust Center from the Tools menu to open the Trust Center window.
2. Select E-mail Security from the list on the left.
3. Select the option Encrypt Contents and Attachments for Outgoing Messages.

Digitally Signing Messages

As with encryption, you can apply digital signatures to individual outgoing messages or to all of them.

To add a digital signature to an individual message:

1. Create, compose, and address a new email message as usual.

2. Click the arrow in the Options section of the Message ribbon to display the Message Options dialog box.
3. Click the Security Settings button to open the Security Properties dialog box (shown earlier in Figure 20.6).
4. Select the Add Digital Signature to the Message option.
5. Click OK, then click Close, to return to the message.

To add a digital signature to all outgoing messages:

1. Select Trust Center from the Tools menu.
2. Click E-mail Security.
3. In the Encrypted E-mail section, select the Add Digital Signature to Outgoing Messages option.
4. Click OK.

HTML Message Dangers

Because HTML messages can contain script and ActiveX controls, they are a potential source of virus attacks. To guard against any HTML viruses that make it past your anti-virus software, you can tell Outlook to display HTML messages as plain text. Because scripts and ActiveX controls are not activated until the HTML is displayed, this prevents them from doing harm.

To guard against malicious HTML messages:

1. Select Trust Center from the Tools menu.
2. Click E-mail Security.
3. Under Read as Plain Text, select the Read All Standard Mail in Plain Text (this means unsigned messages).
4. If you want to include digitally signed messages, select the Read All Digitally Signed Mail in Plain Text option.
5. Click OK.

Switching from Plain Text to HTML Display

If you have set your options to read HTML messages as plain text, you can switch an individual open message to HTML display by clicking the Info bar and selecting Display as HTML.

Summary

You ignore email security at your own peril. In today's interconnected world, it is all too easy for viruses and other malicious software to spread. Fortunately, Outlook provides you with a number of tools that help you to protect yourself against these threats.

Chapter 21

Using Outlook with Other Applications

IN THIS CHAPTER

Outlook is part of the Microsoft Office suite of productivity programs. Microsoft has designed these programs to work with each other, sharing data to make your work easier. Outlook can also work with other non-Office applications. This chapter explores some of the ways you can integrate Outlook with your other programs.

Sending Email from Office Applications

Office users often need to send various documents via email, such as sending a Word document or an Excel workbook to a client or colleague for review. The usual procedure is as follows:

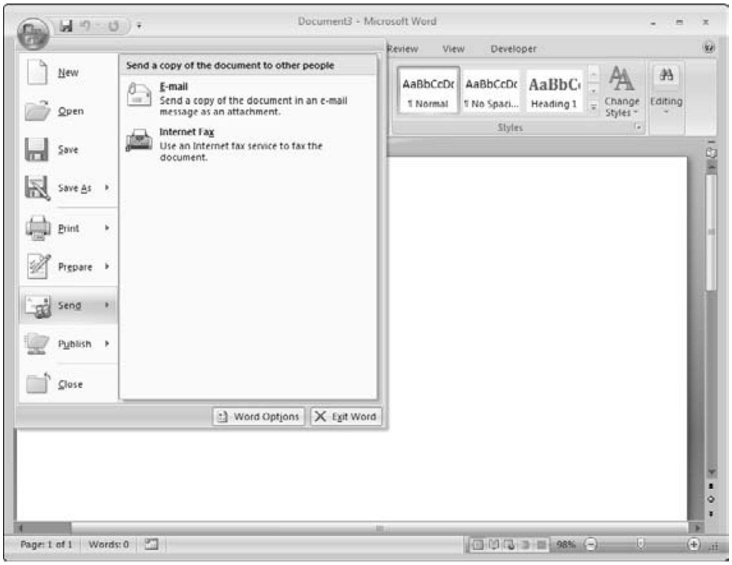
1. Create the document, for example a report written in Word.
2. Save it to disk.
3. Start Outlook if necessary, or switch to it.
4. Create a new email message.
5. Click the Attach File button in the message.
6. Locate and select the document.
7. Complete the message and send it.

There's an easier way, however. On the Office menu in other Office applications (you open this menu by clicking the Office button at the top left of the application screen), you'll find a Send command, and on the next menu an

E-mail command, as shown for Word in Figure 21.1. When you select this command, Office creates a new email message with the document attached. All you need to do is compose and address the message, and then send it.

FIGURE 21.1

Using the Send E-mail command in other Office applications to send a document as an email attachment.



Pasting Office Application Data into Email Messages

An alternative to attaching Office documents to email messages is to include the document, or part of it, right in the body of the email message. There are a couple of reasons why you might want to do this:

- You can easily send part of the document rather than the whole thing.
- The content is immediately visible when the recipient opens the message — he does not have to open, or even have, the parent application to view it.

A potential disadvantage is that the recipient will not have a complete document that he can open and edit. Sometimes, however, that's just what you want: to let someone view and perhaps approve something without having access to an editable document.

Exploring Paste Special

In some situations, the Paste Special command gives you additional options for pasting data. It is accessible by clicking the arrow at the bottom of the Paste button on the Message ribbon. The Paste Special command will be available only when the Clipboard contains appropriate data.

NOTE **Please note that you cannot paste formatted content into plain text email messages, only HTML and RTF format messages.**

The procedure is simple — simply select the content in the parent application and select the Copy command (or press Ctrl+C). Then switch to the email message you are composing, position the cursor at the desired location, and select Paste (or press Ctrl+V).

What can you paste into an email message? The possibilities are almost endless. You can paste formatted text from Word, and the fonts, colors, and other formatting details will all be retained. You can copy and paste a table created in Word, and your email message will have the same table. Charts created in Excel are another example of a data element you can paste into an email message.

Figures 21.2 and 21.3 show an example of a formatted Word document and the results when you paste the text into an email message. Figures 21.4 and 21.5 show an example using an Excel chart.

FIGURE 21.2

A formatted Word document can be copied and pasted into an email message.

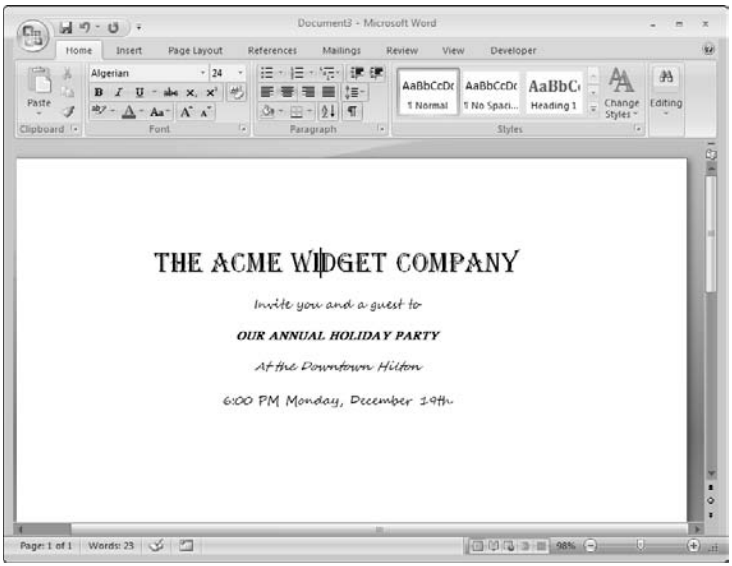


FIGURE 21.3

An email message after pasting the formatted text from the Word document in Figure 21.2 into it.

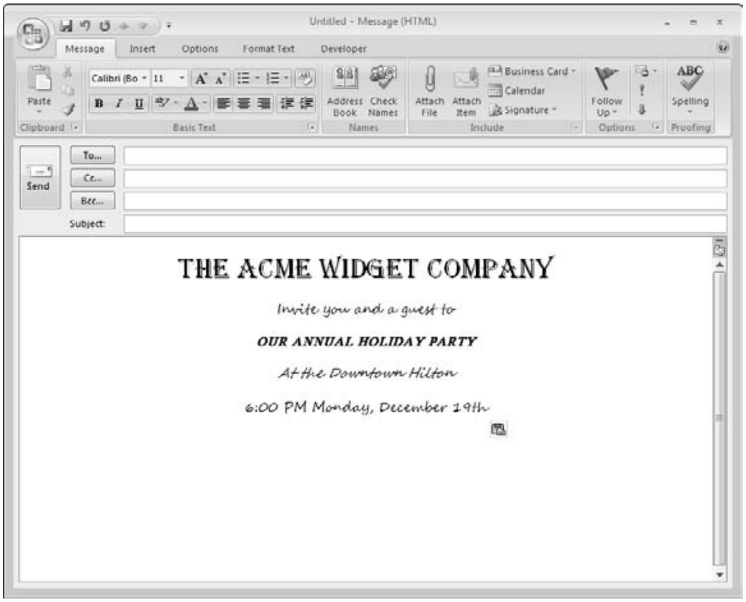


FIGURE 21.4

A chart created in Excel is also a candidate for pasting into an email message.

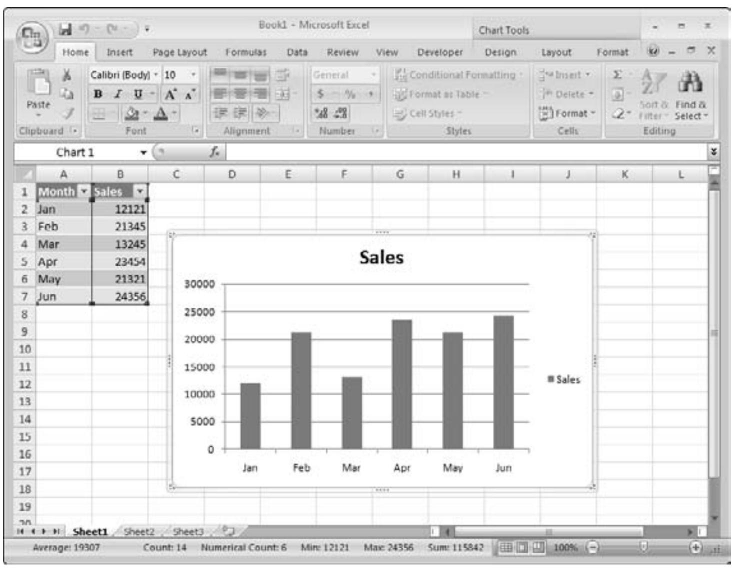
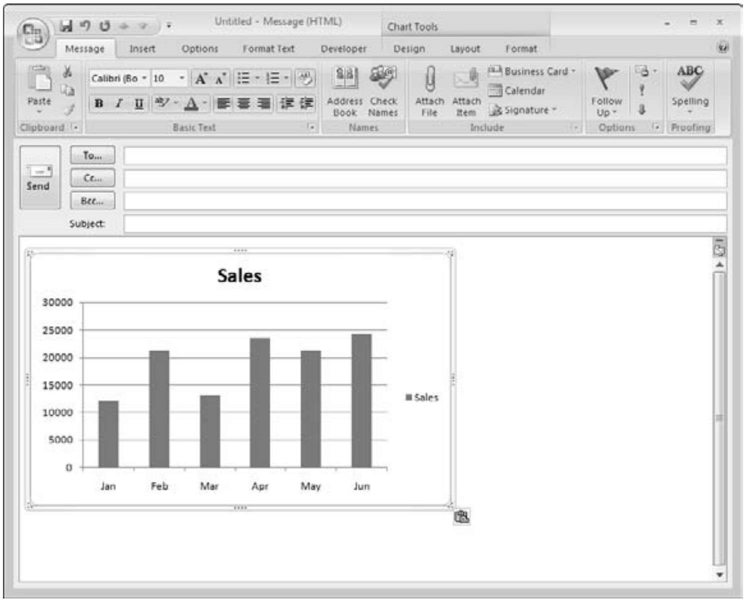


FIGURE 21.5

A chart pasted from Excel into an email message looks exactly the same as the original.



Can you edit text or other data after pasting it into a message? Generally speaking, yes. Pasted text and tables can be edited just as if you had typed them directly into the message. Other pasted items, such as charts, will be more or less editable depending on the program they came from. Right-click such a pasted object to view a context menu that will contain any available editing commands. However, it is almost always preferable to perform necessary editing in the parent application before copying to the message.

Note that copy and paste is a two-way street — you can copy data from Outlook and paste it into other programs as well.

Not Just Office Programs

You are not limited to pasting data into messages from only Microsoft Office programs. Essentially any Windows application has the ability to copy data to the Clipboard from where you can paste it into a message.

Creating Mailings Using Outlook Contacts

Outlook Contacts is a great place to keep all the information about your friends, family, and business associates, including their postal addresses. You can use this information to create a mail merge using Microsoft Word. In a *mail merge*, you create a form letter and then Word creates one copy of the letter, along with an envelope or mailing label, for each name and address in a list. Outlook Contacts is one possible source for this list. Of course, this will work only for those contacts whose postal address is included in their Contacts entry.

This is not a book about Word, so I will not go into the complete details of performing a mail merge using Outlook Contacts, just the basics.

A mail merge document is created using two kinds of elements. One element is normal text that you type in as usual. Sometimes this is called *boilerplate* text because it will be the same in every document or message. The other element is fields that specify where in the document information from the recipient list is to be placed. For example, suppose you want to start each letter with "Dear" followed by the recipient's first name. You would type "Dear " (note the space!) and then insert the first name field; it will look like this in your document:

Dear <<first>>,

To perform a merge in Word using Outlook Contacts:

1. Start a new document in Word.
2. Click the Mailings tab to display the Mailings ribbon.
3. In the Start Mail Merge section, click Start Mail Merge.
4. Select the type of document you want to create from the menu (see Figure 21.6).
5. Click the Select Recipients button on the ribbon.
6. Choose Select from Outlook Contacts from the menu. If you have more than one Contacts folder, you will be prompted to select the folder to use.

Email Merge

Word also has the capability to perform a merge whose output is email messages. This may seem unnecessary — after all, it's easy enough to create a message and send it to multiple recipients using Outlook alone. However, a merge lets you personalize the messages, such as starting each one with "Dear Alice" or whatever the recipient's first name is.

7. Word displays a list of all contacts in the selected folder, as shown in Figure 21.7. Actions that you can take here include:
   - Remove the checkmark from any recipients that you do not want included in the merge.
   - Click the Sort link to specify the order of the merge (for example, ZIP code order, last name order, and so on).
   - Click the Filter link to filter the recipient list (for example, only recipients in California).
   - Click the Find Duplicates link to scan the recipient list for possible duplicates.
8. Click OK.

At this point, you are ready to start composing your document. Enter and format text as usual. When you come to a place where you want the document personalized with information from the recipient's list, click Insert Merge Field on the ribbon. Word displays a list of all the available fields, as shown in Figure 21.8.

FIGURE 21.6

Selecting the type of output document for a mail merge.

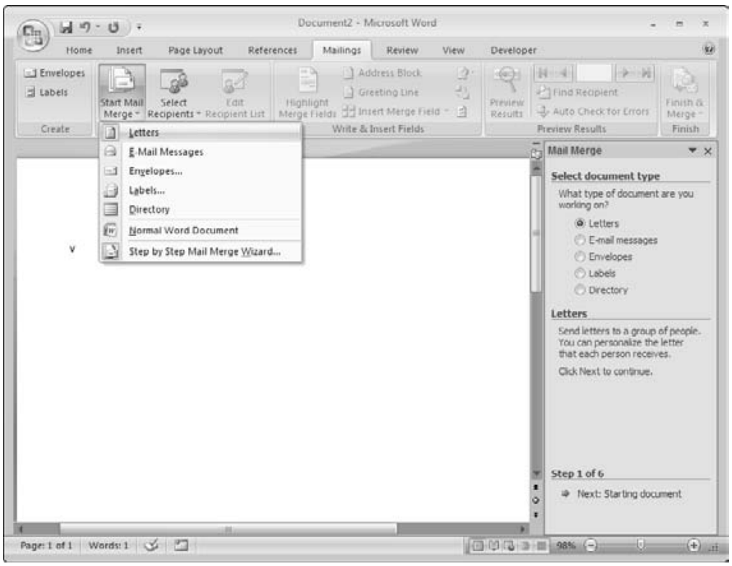
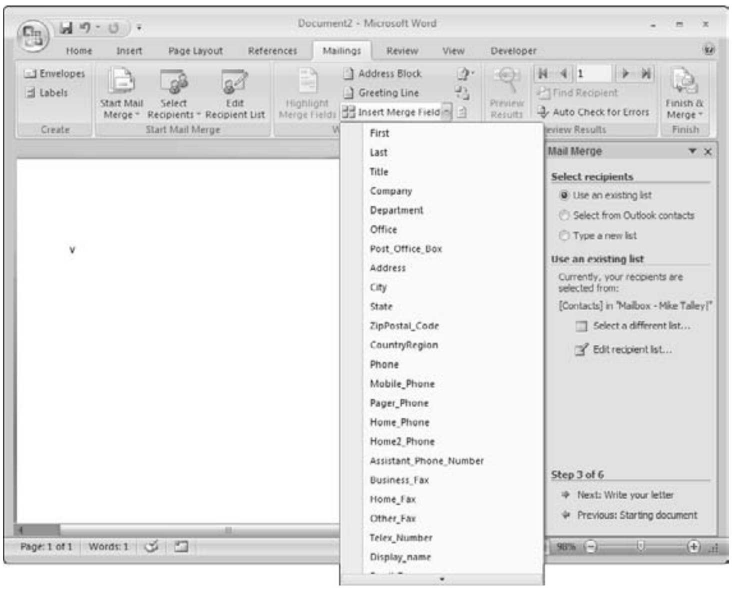


FIGURE 21.7

Selecting the contacts to include in a mail merge.

FIGURE 21.8

Inserting a merge field into a mail merge document.



Using the Mail Merge Wizard

When you are selecting the type of document for your merge, one of the menu choices is Step By Step Mail Merge Wizard. If you select this command, the wizard will walk you through all the steps of creating your mail merge.

As you work on the document, you can preview what the end result will look like by clicking the Preview Results button. All merge fields in the document are replaced with data from the first contact in the recipient list. Click the button again to return to the display of merge fields.

When the document is complete, click the Finish & Merge button. The options available on this menu depend on the type of merge you are performing. For example, if you are creating an email merge, you can select Send Emails to generate and send the merged email messages.

Summary

Outlook is one of several programs in Microsoft's Office productivity suite. These programs are designed to work with each other, sharing data and completing tasks in an efficient manner. This chapter showed you some of the ways you can use Outlook with other Office programs.

Part V

Programming Outlook

IN THIS PART

Chapter 22

Writing Macros and Visual Basic Code in Outlook

A *macro* is a sequence of program commands and keyboard input that has been saved. At any time, you can play the macro back and the result is exactly the same as if you had entered the same commands and input using the keyboard and mouse. Macros are terrific for automatic tasks that you perform regularly, and they can also help prevent errors.

IN THIS CHAPTER

Understanding Macros

Outlook (along with other Office programs) has a built-in programming language called *Visual Basic for Applications*, or *VBA* for short, that lets you write programs, called *macros*, to automate program operations. A macro may do something as simple as inserting a signature into an email message, or something as complex as sorting all incoming email into folders based on the sender. Macros offer two important benefits:

- **They save time.** A sequence of actions that might take you a minute or more to perform manually can be executed essentially instantly with a macro.
- **They prevent errors.** A properly written macro does not make mistakes. It performs the exact same sequence of commands each time it is run without typos or other errors.

You are not limited to using macros that you write. You may be able to get useful macros from your friends and colleagues, and some commercial products that add functionality to Outlook do so by means of macros. In any situation where you are considering a macro from an outside source, you must be aware of the issues surrounding macro security as discussed later in this chapter.

Recording Macros? Sorry, No.

Many programs (including Word and Excel) let you record macros. In other words, you perform the desired series of actions, and the macro recorder saves the corresponding VBA commands. You can then use the recorded macro as-is or modify it. Unfortunately, Outlook does not have a macro recorder — the only way to create a macro is to write it yourself.

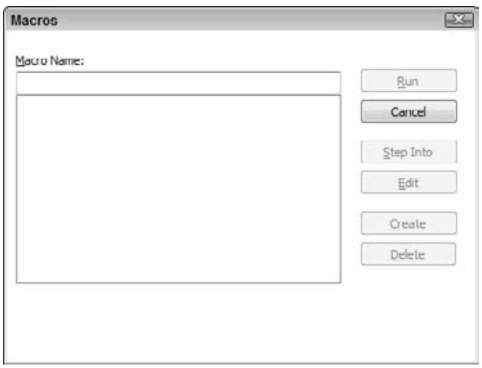
Many people use Outlook for years without ever wanting or needing to create or use macros. The fact is, however, that macros are an extremely powerful tool, and you may be missing a lot of time savings and error prevention if you ignore them.

The Macros Dialog Box

Outlook's macro command center is the Macros dialog box, shown in Figure 22.1. You open this dialog box by pressing Alt+F8 or selecting Macro from the Tools menu and then selecting Macros.

FIGURE 22.1

The Macros dialog box is Outlook's macro "command center."



If you have any macros defined they will be listed here, otherwise the list will be empty. If you select an existing macro from the list, you can take the following actions by clicking the buttons in the dialog box:

- **Run:** Execute the macro.
- **Step Into:** Debug the macro. Debugging macros is covered later in this chapter.

Other Ways to Run Macros

In addition to running a macro from the Macros dialog box, you can assign macros to your menus and toolbars for easier access. This is explained later in this chapter.

- **Edit:** Open the VBA editor to edit the macro.
- **Delete:** Delete the macro.

To create a new macro, enter its name in the Macro Name box (the name must be unique for obvious reasons) and click the Create button. Outlook opens the VBA Editor with the shell — that is, the first and last lines — of the new macro in place, ready for you to add code.

The VBA Editor

The VBA Editor is where you create, edit, and debug macros. The editor is a powerful programming tool and is designed to make your programming efforts as easy as possible. You can open the editor from Outlook in several ways:

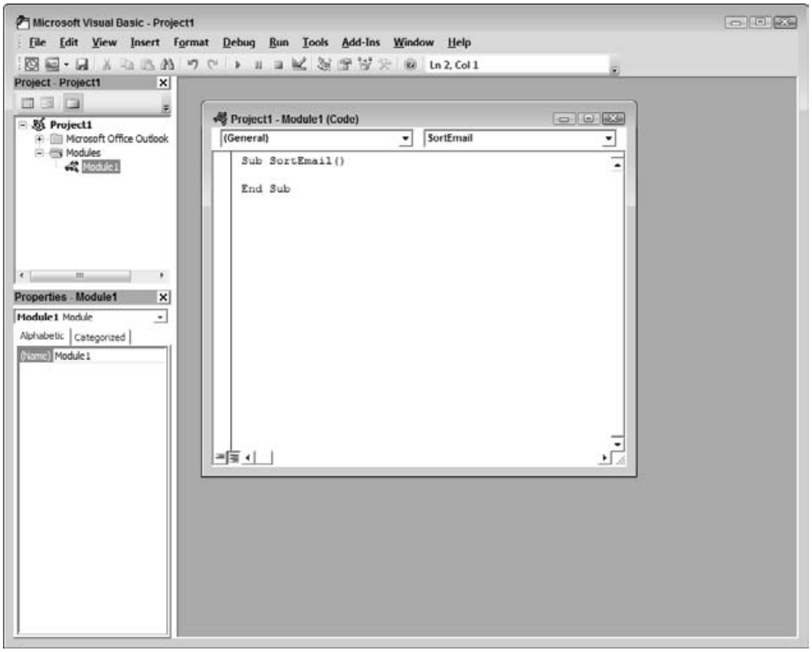
- Press Alt+F11 (press Alt+F11 again to return to Outlook).
- Select Macro from the Tools menu and then select Visual Basic Editor.
- From the Macros dialog box, select the Edit or Create command (as explained in the previous section).

The VBA Editor is shown in Figure 22.2. You learn more about the editor's various tools and commands in subsequent chapters; for now it's enough for you to become familiar with the parts of the editor screen:

- At the top left of the screen is the *Project Explorer*, where the editor lists the various components of the Outlook VBA project.
- At the bottom left of the screen is the *Properties window*, where you view and edit the properties of whatever object is currently selected. In the figure, there is only a single property, but in other situations there will be dozens of properties listed here.
- The main part of the screen, at the top right, displays one or more editing windows. It's here that you enter and edit VBA code.
- At the bottom of the screen is the *Immediate window*, which you can use to debug macros.

FIGURE 22.2

The VBA Editor.



Security and Macros

VBA is a powerful programming language. As such, it has the potential to do great harm to your data and files. So-called *macro viruses* have become more common, and are typically spread when Office documents are passed around as email attachments.

Outlook- based macro viruses are rarely if ever a problem because of the way its macros are stored. With other Office programs, such as Word and Excel, macros can be a part of an individual document and will go along with the document when it is forwarded as an attachment, thus permitting a malicious macro to be spread. In contrast, Outlook macros are not part of any document but are associated and stored with the Outlook program itself. In other words, you cannot pass an Outlook macro to someone else by sending them an email or any other Outlook data (you can specifically export an Outlook macro to send to someone else, but in that case it's obvious what's happening).

Does this mean that you need not be concerned with macro security? Absolutely not! Chapter 20 explains a variety of measures that Outlook users should take with regards to security.

WARNING **Even when it comes to Outlook macros, you must use caution. Just because you cannot be infected with a malicious Outlook virus by means of an email attachment does not mean you are safe. If you plan to use macros from any outside source, you should use macros from trusted sources only, and when in doubt look over the macro source code to look for potential problems.**

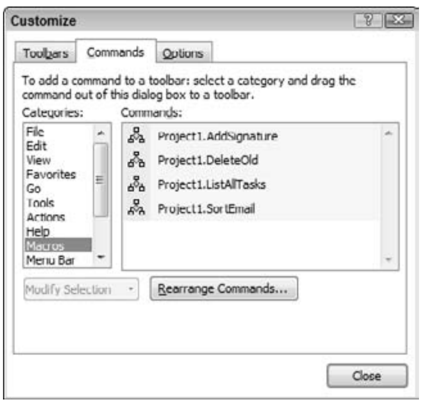
Assigning Macros to Menus and Toolbars

When you have a few macros that you use a lot, you may not want to open the Macros dialog box to run them each time. You can place a macro on a menu or a toolbar to make it more readily available. The procedures are similar to those for customizing menus and toolbars that were covered in Chapter 19. You may want to create a new toolbar, as explained in that chapter, specifically for macro commands:

1. In Outlook, select Customize from the Tools menu to display the Customize dialog box.
2. If necessary, click the Commands tab.
3. Select Macros in the Categories list. As shown in Figure 22.3, the Commands list displays the names of all macros.
4. To place a macro on a toolbar or menu, drag it from the list and drop it at the desired position on the toolbar or menu.
5. When finished placing commands, click Close to close the Customize dialog box.

FIGURE 22.3

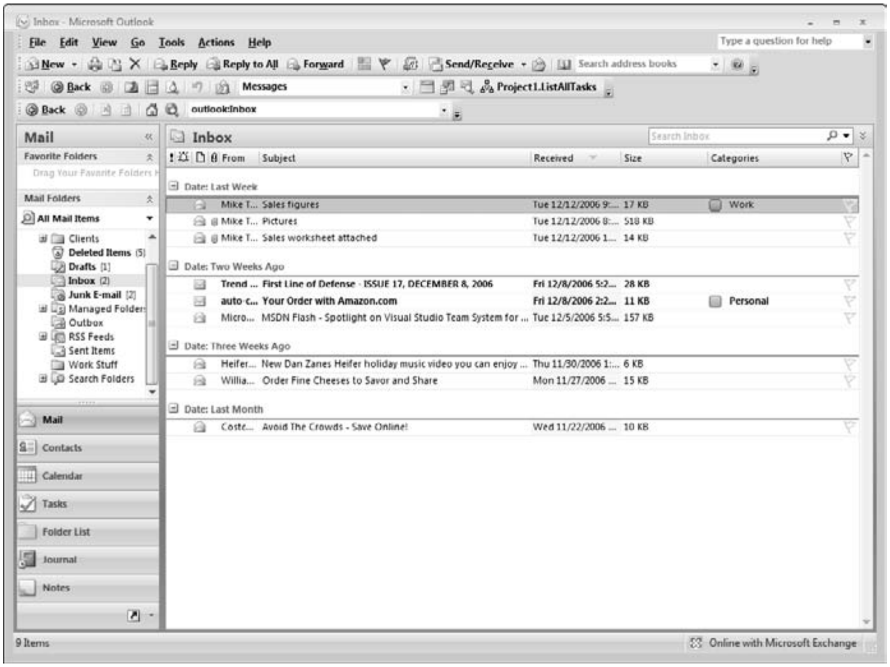
Assigning macros to menus and toolbars.



By default, a macro is displayed on a menu or toolbar with the macro name and the generic Macro icon, as shown in Figure 22.4.

FIGURE 22.4

A toolbar or menu initially displays a macro's name and a default icon.



You can change how a macro is displayed on a toolbar or menu. First, you have to open the Customize dialog box by selecting Customize from the Tools menu. You do not actually use the dialog box in these procedures, but it must be open for the menus and toolbars to be in edit mode. Then, right-click the macro item on the menu or toolbar to display the context menu shown in Figure 22.5. The commands are

- **Reset:** Resets the button to the default appearance.
- **Delete:** Deletes the button from the toolbar or menu.
- **Name:** In the adjacent box, edit the text that is displayed on the button.
- **Copy Button Image:** Copy the button's image so you can paste it into another button.
- **Paste Button Image:** Use the image copied from another button.
- **Reset Button Image:** Resets the button to the default "macro" icon.

- **Edit Button Image:** Opens an icon or button editor, shown in Figure 22.6, where you can edit the button's image.
- **Change Button Image:** Lets you select from a gallery of button designs, as shown in Figure 22.7.
- **Default Style:** Sets the button to display an icon only (no text).
- **Text Only (Always):** Sets the button to display text only both in toolbars and on menus.
- **Text Only (in Menus):** Sets the button to display text only on menus.
- **Image and Text:** Sets the button to display both text and an image.
- **Begin a Group:** Adds a vertical (on toolbars) or horizontal (on menus) divider before the button.
- **Assign Hyperlink:** Lets you assign a hyperlink to a toolbar item.

FIGURE 22.5

This context menu provides commands for changing how macros are displayed on toolbars and menus.

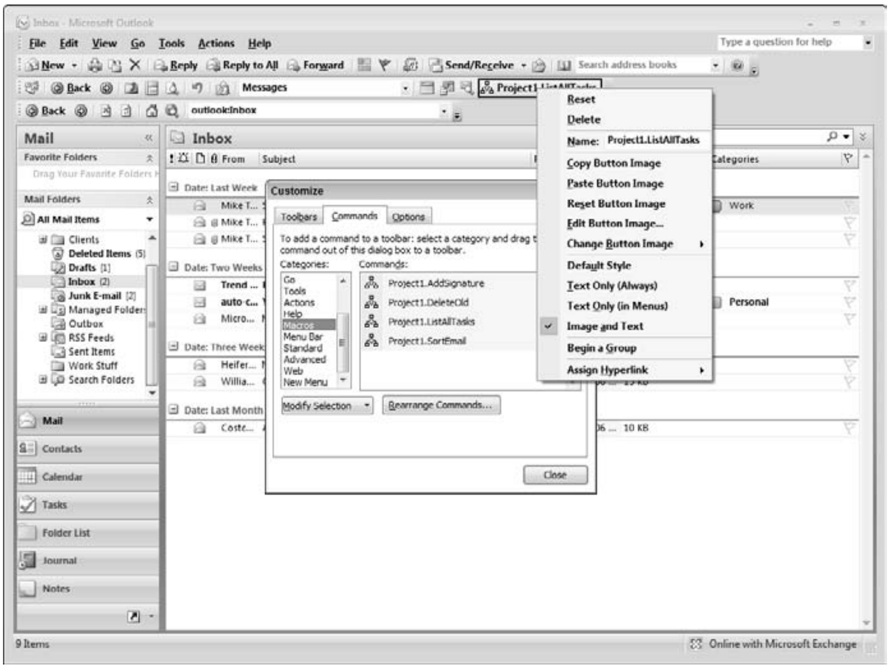


FIGURE 22.6

The Button Editor lets you customize the appearance of toolbar buttons.

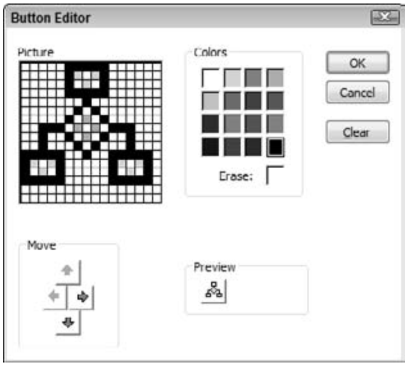
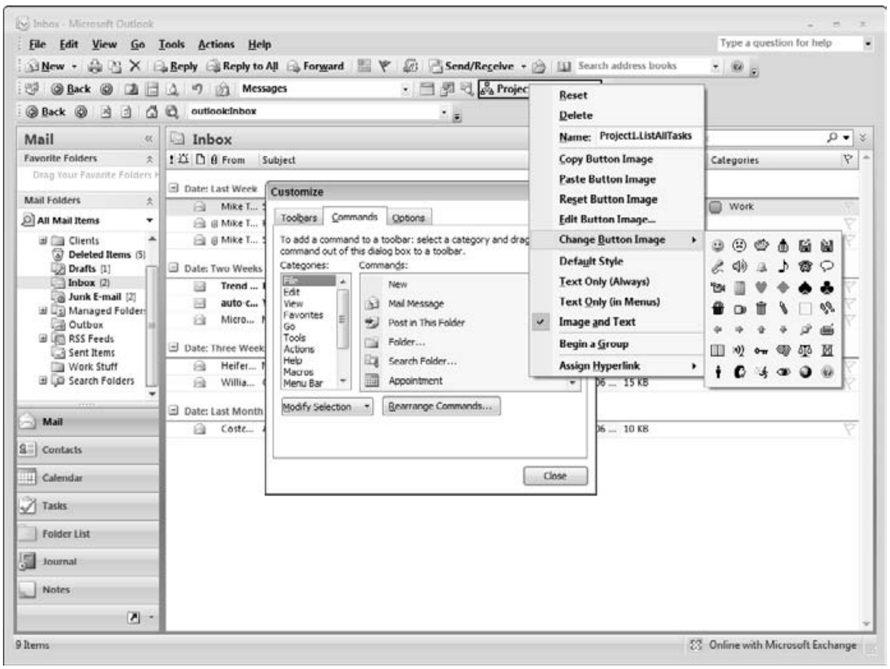


FIGURE 22.7

Selecting a button design from the button gallery.



Assigning Macros to Shortcut Keys

Sorry, no can do. It would be a nice feature to be able to assign frequently used macros to shortcut keys, but Outlook does not permit this.

Debugging Macros

When you create a macro, you may find that it does not do exactly what you wanted it to do. This is called a *bug* and the Outlook VBA Editor provides you with some tools for finding and fixing bugs. Generally, bugs are almost always the result of one or both of the following problems:

- A program variable takes on the wrong value.
- Program execution takes the wrong path through the macro code.

The debugging tools let you address both of these problems as follows:

- Breakpoints let you temporarily suspend the macro's execution at specified lines of code or when specified conditions are met.
- Watches let you examine and change the value of variables during macro execution.
- Controlling execution lets you execute a program one line at a time and control the path execution takes.

Working with Breakpoints

When a macro is executing inside the VBA Editor, you can temporarily pause macro execution — in other words, put the macro in *break mode*. You do this by setting one or more breakpoints, which specify that the program should pause either when a specified line of code is reached or when a certain condition is met. When a program is in break mode, the next statement to be executed is highlighted in the editor window (if possible — the next statement may not be known), and you can carry out various actions to help track down the cause of a bug. Then, you can continue execution normally or terminate the program.

When in break mode, you can rest the mouse pointer over a variable name in your code and the VBA Editor will display the current value of the variable in a small window. You can also edit your code, with some limitations. The other tools described in this section are also available in break mode.

To enter break mode when execution reaches a certain location in your macro code, set a breakpoint on that line. Before you start execution, or while in break mode, move the editing cursor to the line and press F9. A line that has a breakpoint set is displayed in a different color and with a dot in the left margin, as shown in Figure 22.8. Execution pauses just before executing the line with the breakpoint. You can set breakpoints on as many lines as you want. Press F9 again to remove the breakpoint from a line. Press Ctrl+Shift+F9 to remove all breakpoints.

The Debug.Print Statement

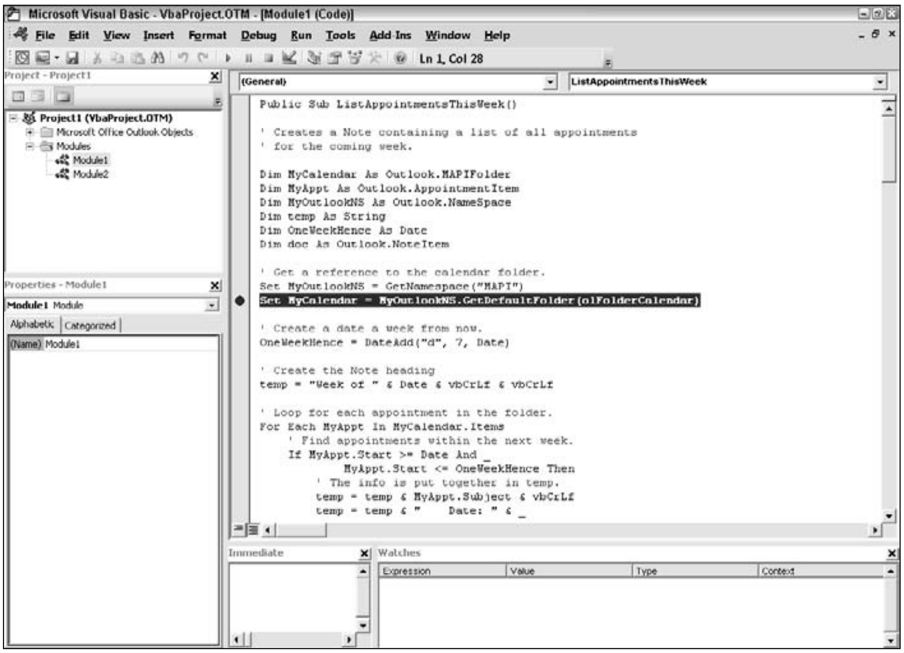
The `Debug.Print` statement is a very useful tool for debugging macros. All it does is display the specified data in the Immediate window of the VBA editor. There are all sorts of uses for `Debug.Print` during program development and debugging, such as verifying the value of variables, seeing where program execution goes, and so on. The beauty of `Debug.Print` is that the statement has no effect outside of the VBA environment, when your macro is being run by the end user. All you do is include the `Debug.Print` statement in your macro code followed by the name of the variable whose value you want to see. For example,

```
Debug.Print "The value of X is " & X
```

displays a message and the value of the variable `X`.

FIGURE 22.8

A breakpoint displays as shown in the VBA Editor.



You can also enter break mode based on the value of variables in your program. For example, you could specify that the program enters break mode when the variable `Count` has the value `100`. You learn about this technique in the next section, "Using Watches."

When you are finished working in break mode, press F5 to continue macro execution. Other options for controlling program execution are covered in the section "Controlling Program Execution" later in this chapter.

Using Watches

While you are debugging a macro you can use watch expressions to keep track of the data your macro is working with. A *watch* can be any expression — variables, properties, functions, and so on. Because many program bugs are caused by variables and properties taking on unexpected values, the use of watches is an important debugging tool.

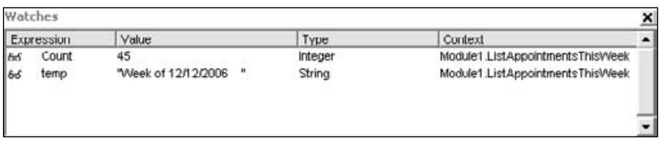
VBA supports two types of watches and you can choose the one that's right for your needs. Regular watches are displayed in the Watches window, which you open by selecting Watch Window from the View menu. You can have multiple watch expressions in the window, and VBA displays the following for each one:

- **Value:** The current value of the watch expression.
- **Type:** The data type of the watch expression.
- **Context:** The names of the module and macro where execution is paused.

The Watches window is shown in Figure 22.9. It indicates the variable `Count` is type Integer and has the value `45`, and the variable `temp` is type String as has the value `"Week of 12/12/2006"`.

FIGURE 22.9

Use the Watches window to view the value of variables and expressions during macro debugging.



A watch expression can be a single variable or an expression made up of variables and any of VBA's operators and functions. You would create watch expressions when you are interested in the relationship between variables rather than their exact values. For instance, you might need to keep track of whether the variable `Count` is greater than the variable `Max` without regard to their actual values. The watch expression `Count >Max` displays a result of either `True` or `False` depending on the data. Likewise, if you want to see whether a string's length is less than 10, you would use the watch expression `Len(SomeString)<10`.

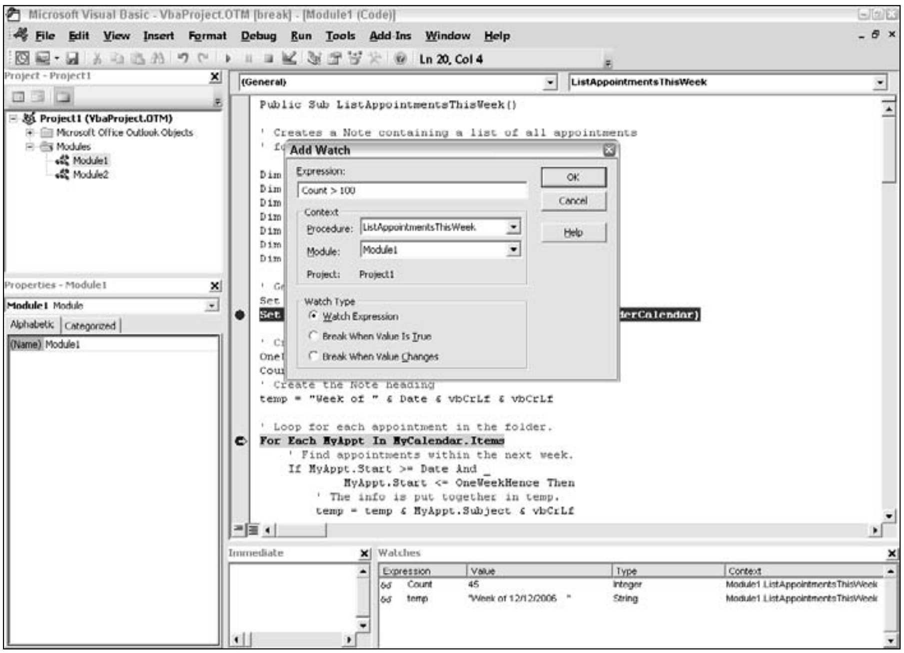
To add a variable to the Watches window, right-click the variable name in your code and select Add Watch from the popup menu. To add an expression to the Watches window:

1. Move the editing cursor to any location in the code you are debugging.
2. Select Add Watch from the Debug menu. VBA displays the Add Watch dialog box (see Figure 22.10).
3. Enter the desired watch expression in the Expression box.
4. Make sure the Watch Expression option is selected.
5. Click OK.

Each time the program enters break mode the display in the Watches window is updated. Then, you can examine the values of your watch expressions to determine whether they reveal anything about the bug you are working on. You can also edit a watch expression, or delete it from the window, by right-clicking it and selecting from the popup menu.

FIGURE 22.10

Adding a watch expression to the Watches window.

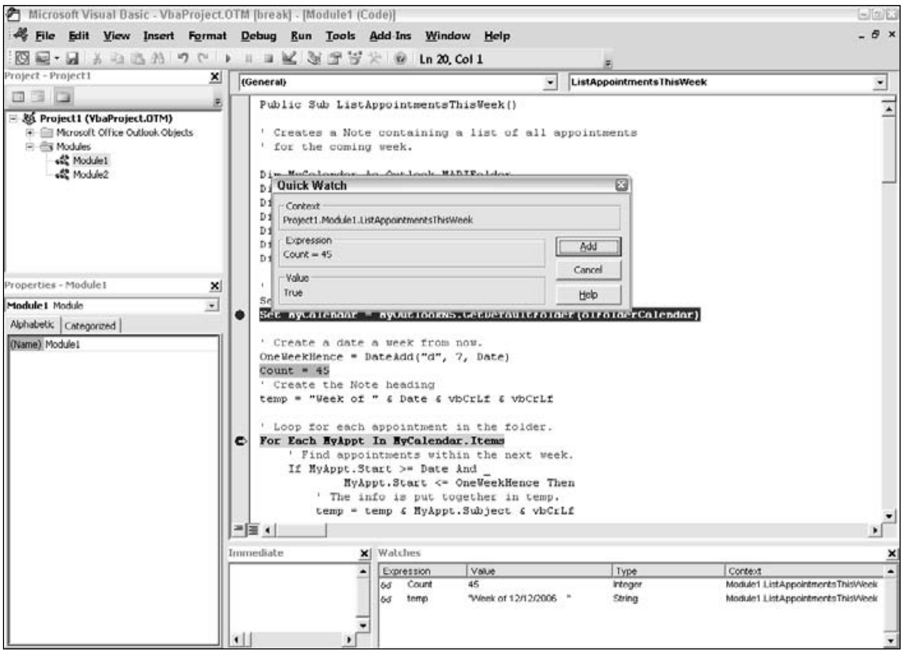


The second type of watch is called a Quick Watch. When the macro is in break mode, highlight an expression in your code and select Quick Watch from the Debug menu (or press Shift+F9). VBA displays a box containing the current value of the expression as well as its data type and context. Figure 21.11 shows a Quick Watch display.

Watches can also be used to control break mode. For example, you can specify that the macro break either when a watch expression is True or when a watch expression changes value. You add this type of watch using the Add Watch dialog box (see Figure 22.10), and is displayed in the Watches window along with other watches. Type the expression in the Expression box of the Add Watch dialog box, then select either the Break When Value Is True or Break When Value Changes option. In the Watches window, the three types of watches — regular, break on true, and break when changes — are displayed with different symbols in the left column. When a program breaks based on a watch expression, the corresponding watch expression is highlighted in the Watches window.

FIGURE 22.11

Displaying Quick Watch information about an expression.



Watches and Scope

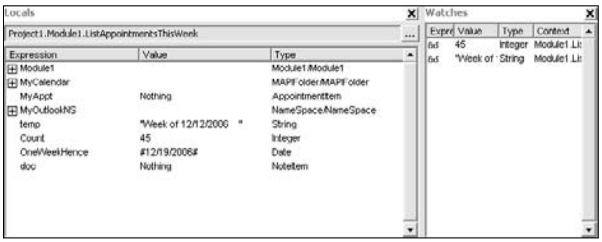
To be available for a watch, a variable must currently be in scope. If you are debugging code in one procedure, the local variables in a second procedure will not be available because they are out of scope. Out of scope variables in a watch expression display as Out Of Context until the variable comes back into scope.

The Locals Window

VBA provides yet another useful way of keeping track of the values of program variables — the Locals window. To display this window, shown in Figure 22.12, select Locals Window from the View menu. You cannot specify what is shown in this window — it always displays the values and types of all variables, properties, objects, and constants that are in scope at the time the program enters break mode.

FIGURE 22.12

The Locals window.



Controlling Macro Execution

The ability to control the execution of your macro can be an essential part of debugging. Earlier in this section you have seen how to pause macro execution, entering break mode based on code location or on the value of program variables. Once you are finished working in break mode, you have several choices on the Debug menu:

- **Continue (F5):** Continues macro execution normally.
- **Step Into (F8):** Executes the next statement then pauses in break mode. If the next statement is a procedure call, pauses at the first statement in the procedure.

Other Uses for the Immediate Window

You have already seen how to use the `Debug.Print` statement to display information in the Immediate window. This window has other uses as well. When a macro is in break mode, the Immediate window has the same scope as the current procedure. You can change the value of a variable by simply typing the new value in the Immediate window. For example, if the current procedure has a variable `Count`, then by typing

```
Count = 100
```

in the Immediate window (on its own line) and pressing Enter you assign the new value to the variable. When you continue program execution you can see the effects of the new value.

- **Step Over (Shift+F8):** Executes the next statement then pauses in break mode. If the next statement is a procedure call, executes the entire procedure then pauses after exiting the procedure. This command has the same effect as Step Into if the next statement is not a procedure call.
- **Step Out (Ctrl+Shift+F8):** Executes to the end of the current procedure, then pauses in break mode.
- **Run to Cursor (Ctrl+F8):** Executes to the line of code containing the cursor, then pauses in break mode.

The Step Into and Run to Cursor commands are available even when you are not in break mode. By using one of these commands to start the macro, rather than the usual Run Sub/User Form command (or pressing F5), you can start the project and run it one line at a time, or up to the cursor.

What's Next?

This chapter has just scratched the surface of Outlook macros and VBA programming. Here's a brief look at what's coming up. The next three chapters deal with macros and VBA programming in more detail:

- Chapter 23 deals with the VBA language and how it is used to write macros. You need an understanding of VBA structure and syntax before you can proceed.
- Chapter 24 explores the Outlook Object Model, which provides the VBA programmer with a rich set of objects that represent various elements in Outlook, such as messages, contacts, and tasks. Macro programming is mostly a matter of manipulating these objects to accomplish your task.
- Chapter 25 walks you through some complete, real-world examples of Outlook macros.

Summary

This chapter has introduced you to Outlook macros and VBA programming. Macros let you automate repetitive, commonly performed tasks and can save you time and errors. Though you cannot record macros in Outlook, you can create your own and import macros from friends and colleagues. There's a lot more to learn, so stay tuned.

Chapter 23

Getting Started with VBA

IN THIS CHAPTER
Basic VBA syntax
Storing data — variables, arrays, and constants
VBA operators
Conditional and loop statements
Writing and calling procedures

VBA, or Visual Basic for Applications, is the programming language built in to the programs in the Microsoft Office suite, including Outlook. To be able write and edit Outlook macros, you must have a decent understanding of the VBA language. Fortunately, it is a fairly easy language, having been designed from the very beginning to be accessible not just to computer geeks but also to us ordinary mortals.

This chapter provides an introduction to the VBA language, giving you an overview of the most essential language elements. It is by no means a complete treatment of VBA — that would require an entire book in itself! With the information provided in this chapter, you can start writing useful macros. As your needs and interest dictate, you can find more information on VBA in the online help, books, and other sources.

Basic VBA Syntax

A VBA program, or *macro*, is made up of a series of VBA statements. Each *statement* is an instruction that tells Outlook to perform an action such as adding two numbers or opening an email message. Each statement is on its own line in the source code, although long lines can be split with a space followed by an underscore in order to make them easier to read in the editor. Thus, the following is treated as a single line of code:

```
ActiveWorkbook.CustomDocumentProperties.Add _
    Name:="Part number", LinkToContent:=False, _
    Type:=msoPropertyTypeNumber, Value:=566
```

Outlook is very literal when it comes to running VBA code. It can do only what you specify in the code — it has no way of knowing what you really meant. Even the slightest misspelling or punctuation error will cause problems, so you need to be careful. Fortunately, the case of words does not matter.

Code Comments

A *comment* is text in your macro code that is for information only — it has no effect on how the macro operates. Comments are useful — in fact they are recommended — for describing how your code operates. Then, when you or someone else needs to edit the code sometime down the road, its operation will be clear and not a matter of guesswork.

To create a comment, start a line with either an apostrophe or `REM`. You can put a comment at the end of a line of code using the apostrophe but not `REM`:

```
Rem This is a comment.
' This is another comment.
Dim S As String ' This too is a comment.
Dim S As String Rem But this is not permitted.
```

Storing Data

Many macros need some way to store data while they are running. This is temporary storage and lasts only while the macro is running — it is not permanent such as saving something to disk. VBA gives you a full range of options for storing data.

Variables

A *variable* is a place where you can store a single piece of information, such as a number of a segment of text. The name "variable" comes from the fact that the information can change while the macro is executing — it is not fixed. When you create a variable, you assign it a name, and then you use that name to refer to the variable in your source code. VBA variable names must follow these rules:

- Do not use one of VBA's keywords.
- The maximum length is 255 characters.
- The first character must be a letter.
- The name cannot contain a period, space, or any of these characters: ! @ # & % $.

The case of names is irrelevant, although the VBA Editor automatically adjusts case to be the same for all instances of a given variable name. For example, if the first time you use a variable you call

it `Count`, and the second time you type in `COUNT`, the second entry will be changed to `Count` by the editor.

You should use *descriptive variable names* — that is, names that describe the data the variable holds. For instance, a variable that holds an interest rate might be called `IntRate` or `InterestRate`. You could call it `MickeyMouse` or `Q99` and VBA would not care, but descriptive names make your code a lot easier to read and debug.

It is common practice, although not required, to use a combination of upper- and lowercase letters for variable names as shown in these examples:

- `TotalOfIncome`
- `AverageSize`
- `RecipientEmailAddress`

All variables should be *declared* before being used for the first time. This tells VBA about the variable, specifically its name and the kind of data it will hold. A variable declaration takes this form:

```
Dim varname As type
```

`varname` is the name of the variable, and `type` is the name of the variable's data type (as explained in the following sections). You can place multiple declarations on the same line:

```
Dim varname1 As type1, varname2 As type2, varname3 As type3
```

I say that variables *should be* declared, not that they *must be* declared. VBA gives you the option of not requiring variable declaration — you simply use new variable names as needed in your code. This may sound like a good idea, but in fact it is not. When variable declaration is required, misspelling a variable name results in an error message when you run the program, because the (misspelled) variable has not been declared, and the misspelling can be easily corrected. If variable declaration is not required, misspellings go undetected and can cause lots of problems. To make sure variable declaration is required, select Tools, Options in the VBA Editor and select the Require Variable Declaration option on the Editor tab. You can obtain the same effect by placing the `Option Explicit` statement at the start of every VBA module.

Numeric Variables

Numeric variables hold number data. VBA has six different numeric variable types that differ in whether they hold integer data (numbers without a decimal part such as 2, –145, and 32,190) or floating-point data (numbers with a decimal part such as –1.143, 0.0045, and 123,900.5). These six numeric variable types are summarized in Table 23.1.

TABLE 23.1

VBA's Numeric Data Types

Name	Type	Range	Precision	Size
Byte	Integer	0 to 255	N/A	1 byte
Integer	Integer	–32,768 to 32,767	N/A	2 bytes
Long	Integer	–2,147,483,648 to 2,147,483,647	N/A	4 bytes
Single	Floating point	-3.4×10^{38} to 3.4×10^{38} *	6 digits	4 bytes
Double	Floating point	-1.79×10^{308} to 1.79×10^{308} *	14 digits	8 bytes
Currency	Floating point	-9.22×10^{11} to 9.22×10^{11} *	4 digits	8 bytes

* Approximate values

Why have three integer types and three floating-point types? You can see that the types differ in terms of the range of values they can hold and, for the floating-point types, their precision or accuracy. They also differ in the amount of memory they consume. It's also true that certain operations, such as division, are faster with the integer types. To be honest, these memory and speed differences are rarely relevant with today's fast, memory-laden computers. Choose a numeric data type based on the range of values the variable will hold. When in doubt, it is always advisable to err on the side of caution, using a type `Long` rather than a type `Integer`, for example. If you try to store an out-of-range value in a variable, VBA generates an `Overflow` error.

String Variables

Strings, which is just programmer-talk for text data, represent the second main class of data that VBA programs work with. VBA provides two types of string variables. A *variable-length* string can hold any amount of text up to about 2 billion characters. A variable-length string expands and contracts automatically to fit the data you put in it, so you do not need to specify the size when declaring it:

```
Dim City As String
```

A *fixed-length string*, on the other hand, has a fixed size you specify when the variable is declared. This can range from 1 to as many as approximately 64,000 characters. The declaration syntax is as follows:

```
Dim FirstName As String * 15
Dim  LastName As String * 15
```

If you assign text that is too long to a fixed-length string variable, the extra part of the text is cut off and lost.

VBA can figure out that you mean to use `s` as a number even though it was declared as a string, so the division is performed properly with the result that `i` is equal to 8.

Numbers Versus Strings

You need to be aware of the difference between a number and a text representation of a number. In a VBA program, 12345 (without quotes) is a number, whereas "12345" is text. VBA is actually pretty clever when it comes to figuring out what you mean. For example, look at this code:

```
Dim s As String
Dim i As Integer
s = "16"
i = s / 2
```

Constants

As its name implies, a *constant* is program data whose value does not change. VBA has two types of constants, literal and symbolic. A *literal constant* is a number or string typed directly into your code. String literals are typed in double quotation marks. Numeric literal constants are typed without special formatting. In this code, `"Jackson"` and `0.75` are literal constants:

```
Dim Ratio As Single
Dim Name As String
Max = 0.75
Name = "Jackson"
```

A *symbolic constant* has a name. To create a symbolic constant, use the `Const` keyword:

```
Const CONSTNAME As Type = value
```

The rules for constant names are the same as for variables. I like to use all uppercase names with underscore separators for constants, which makes them easily distinguishable from variables in the code (which are commonly written with a combination of upper- and lowercase). Thus, `PRIME_RATE` is easily identified as a constant, and `PrimeRate` is clearly a variable. The `As` type part of the declaration is optional and is required only if you want the constant to be stored as a specific data type. `value` is the constant value.

Here are two examples:

```
Const PRIME_RATE As Double = 0.042

Const FILE_SAVE_PATH = "c:\my documents\databases\"
```

A big advantage of using symbolic constants is that you can change the value of a constant throughout the program simply by editing its declaration statement. Another advantage is that the constant's name can help in making the program easier to read.

Boolean Variables

Boolean variables can hold only the two values `True` and `False`. They are widely used in all areas of programming because you'll find that you often need to store values that are true/false, yes/no, or on/off. You assign values to Boolean variables using the VBA keywords `True` and `False`. Here's an example:

```
Dim TaskDueToday As Boolean
TaskDueToday = True
```

Behind the scenes, VBA represents `True` and `False` by the values `-1` and `0`, respectively. When treated as a Boolean, any numeric expression will evaluate as `True` if its value is non-zero.

Date Variables

In VBA, the term "`date`" refers to the time of day as well as the calendar date. Dates are stored internally as floating-point numbers in which the part to the left of the decimal point represents the number of days since December 30, 1899, with negative numbers representing prior dates. The part to the right of the decimal point represents the time as a fraction of a day, so that `.25` is 6 A.M., `.5` is noon, and so on.

The `Date` data type is designed to hold date values. When you display a date value, the display format is determined by the system's short date format setting, and times are displayed as either 12- or 24-hour times, again in accordance with the system settings.

You write literal date values in just about any recognizable format, enclosed in `#` signs. Here are some examples:

```
Dim d1 as Date, d2 As Date, d3 As Date

d1 = #January 31, 2005#
d2 = #31 Jan 05#
d3 = #1/31/2005#
```

The VBA Editor will automatically convert date literals to a standard format. VBA has a wide range of tools for working with dates and times. They are beyond the scope of this chapter, but you can find detailed information on the VBA online documentation.

The Variant Type

The `Variant` data type is VBA's default variable type, and also its most flexible. *Default* means that if you declare a variable without specifying a type, it is created as a `Variant`. These declarations create two type `Variant` variables:

```
Dim x

Dim y As Variant
```

This data type's flexibility comes from its ability to hold almost any type of data (with the single exception of fixed-length strings). Thus, a type `Variant` can hold numbers, text, object references, user-defined types, and arrays. One common use for this data type is when data needs to be treated either as text or as a number depending on circumstances. Another use is as an argument to procedures that can take different kinds of data. You should not, however, simply use type `Variant` as a convenience to avoid the necessity of thinking about what data type should be used for specific variables. The `Variant` data type requires more memory to store, and more processor time to manipulate, than other data types.

Object Variables

Another type of variable holds a reference to an object. *Objects*, which represent the various parts of the Outlook program (among other things), are a central part of VBA programming. You learn more about object variables when you look at Outlook's Object Model in Chapter 24.

Arrays

An *array* is a group of two or more variables that have the same name and are distinguished by a numeric index. VBA offers two types of arrays: static and dynamic.

Static Arrays

A *static array* is created with a specified number of elements and this number does not change while the program is executing. To declare a static array, use the following syntax:

```
Dim ArrayName(n) As type
```

`ArrayName` is the name of the array, which follows the same naming rule as regular VBA variables. `n` is the number of elements in the array, and `type` can be any of VBA's data types. Here's an example:

```
Dim NewArray(100) As Long
```

This statement creates an array of type `Long` variables. VBA starts array indexes at 0; this array actually contains 101 elements, at indexes 0 through 100. You access an array's elements using any expression to specify the index. For example:

```
NewArray(1) = 25
x = 15
NewArray(x) = 99  ' Same as NewArray(15)
NewArray(MyArray(1)) = 5  ' Same as NewArray(25)
```

You can also create arrays where the index does not start at 0 by using the `To` keyword, which lets you specify any starting index you like. The format is as follows:

```
Dim NewArray(start To stop)
```

`start` and `stop` are the starting and ending indexes for the array. Here's an example:

```
Dim Months(1 To 12)
```

The arrays you have seen so far have a single index — they are one-dimensional. VBA also supports multidimensional arrays that have two or more indexes by including the information about the additional indexes in the `Dim` statement. Here's an example that creates a two-dimensional array:

```
Dim ChessBoard(1 To 8, 1 To 8) As Integer
```

Dynamic Arrays

A *dynamic array* does not have a fixed size — it can be enlarged or shrunk while the program is running. The syntax for declaring a dynamic array is the same as for static arrays except that no indexes are specified — the parentheses are left blank:

```
Dim MyDynamicArray() As type
```

Before you can use the array, you must set its size using the `ReDim` statement:

```
ReDim MyDynamicArray(indexes)
```

The `indexes` argument specifies both the number of dimensions and the number of elements, using the same syntax as you learned about earlier for declaring static arrays. Here are some examples of declaring and sizing dynamic arrays:

```
Dim DynamicArray1()
Dim DynamicArray2()
Dim DynamicArray3()
' 1 dimension, 21 elements 0-20.
Redim DynamicArray1(20)
' 1 dimension, 26 elements 5-30.
Redim DynamicArray2(5 to 20)
' 2 dimensions, 40 total elements.
ReDim DynamicArray3(1 To 4, 1 to 10)
```

You can change the array size while the program is running as many times as needed using this syntax:

```
ReDim [Preserve] arrayname(indexes)
```

`indexes` specifies the new array size, as shown here. Use the optional `Preserve` keyword if you want the existing data in the array to be kept. If you omit `Preserve`, the array will be reinitialized and existing data lost when you execute `ReDim`. There are some limitations on the use of `Preserve`:

- When you make an array smaller, the data in the part of the array that is "trimmed off" will be lost.
- You cannot change the number of dimensions of the array.
- For multidimensional arrays, you can change only the upper bound of the last dimension.

User-Defined Types

A *user-defined type*, or *UDT*, can be used to define your own data structures. A UDT contains two or more elements and is designed to meet specific data storage needs of your macro. To define a UDT, use the `Type ... End Type` statement:

```
Type UDTName
    Element1 As type
    Element2 As type
    ....
    Elementn As type
End Type
```

Each element can be any of VBA's data types: `Byte`, `Boolean`, `Integer`, `Long`, `Currency`, `Single`, `Double`, `Date`, variable-length or fixed-length `String`, `Object`, `Variant`, another UDT, or an object type. Each element can be a single variable or an array. The rules for naming the UDT itself and it elements are the same as the rules for naming VBA variables as described earlier in this chapter.

Once you have defined a UDT, you declare it using the `Dim` statement. A UDT must be declared in a module but not within any procedure. Here's a UDT definition:

```
Type Person
    FirstName As String
    LastName As String
    EmailAddress As String
End Type
```

Then declare in a variable of this type:

```
Dim MyBestFriend As Person
```

Finally, access the elements of the UDT using the `VariableName.ElementName` syntax:

```
MyBestFriend.FirstName = "Alice"
MyBestFriend.LastName = "Wilson"
MyBestFriend.EmailAddress = "alice@somewhere.net"
```

You can create arrays of UDTs as well:

```
Dim AllMyFriends(100) As Person
```

Enumerations

An *enumeration* is a user-defined data type that consists of a defined set of symbolic constants. You use the `Enum` keyword to create an enumeration as shown in this example:

```
Enum Flavors
    Vanilla
```

```
        Chocolate
        Strawberry
        Banana
    End Enum
```

This creates an enumeration called `Flavors` with the constants `Vanilla` equal to 0, `Chocolate` equal to 1, and so on. If you do not want the enumeration values assigned sequentially starting at 0, you can specify the values:

```
    Enum Flavors
        Vanilla = 2
        Chocolate = 3
        Strawberry = 5
        Banana = 10
    End Enum
```

Enumerations can be defined only at the module level. Once an `Enum` is defined, it becomes available as a data type you can use to declare variables:

```
    Dim IceCreamCone As Flavors
```

A variable declared as an enumerated type can only take on the set of values defined in the enumeration. A real convenience is that VBA displays autolist members for enumerated types, permitting you to select from a list of the enumeration's constants.

Using Operators

Operators are symbols that instruct VBA to manipulate data in some manner, for example multiplying two numbers. The operators available in VBA fall into several categories.

The Assignment Operator

The *assignment operator* (=) tells VBA to assign a value to a variable. Specifically, the value of the expression on the right side of the operator is assigned to the variable on the left side of the operator. For example, the statement

```
    x = 15
```

assigns the value 15 to `x`.

The Mathematical Operators

The mathematical operators perform the common operations such as addition and division. There are the four common arithmetic operations as follows:

+ Addition
- Subtraction
* Multiplication
/ Division

There are three others that are perhaps less common:

`\`: Integer division without rounding. For example, `15 \ 4` evaluates to 3.

`^`: Exponentiation (to the power of). For example, `2 ^ 4` evaluates to 16.

`mod`: Modulus (remainder after division). For example, `33 mod 6` evaluates to 3.

For both division operators, a `Divide by Zero` error occurs if the divisor is 0.

The String Operator

There is one string operation called *concatenation*, which simply joins two strings together. The operator for this is `&`. For example, after this code:

```
Dessert = "Chocolate " & "cake"
```

the variable `Dessert` contains `"Chocolate cake"`. There are lots of other things you can do with strings, but they involve functions rather than operators. You can find information on these functions in VBA's online documentation.

The Comparison Operators

You use *comparison operators* to perform comparisons between two expressions. The result of a comparison is either `True` or `False` depending on whether or not the comparison was true. The most commonly used comparison operators, which are used primarily with numeric expressions, are

= Is equal to?
> Is greater than?
< Is less than?
>= Is greater than or equal to?
<= Is less than or equal to?
<> Is not equal to?

For example, the expression

```
a < b
```

asks the question "is a less than b?" and returns either True or False depending on the values of `a` and `b`.

The Logical Operators

You use *logical operators* to manipulate logical (True/False) expressions. Most of the logical operators combine two logical expressions into a single logical value. The logical operators are described in Table 23.2.

TABLE 23.2

The Logical Operators

Operator	Example	Evaluation
`And`	`X And Y`	True if both `X` and `Y` are True; False otherwise.
`Or`	`X Or Y`	True if `X` or `Y`, or both of them, are True; False only if both `X` and `Y` are False.
`Xor` (exclusive `Or`)	`X Xor Y`	True if `X` and `Y` are different (one True and the other False); False if both are True or both are False.
`Eqv` (Equivalence)	`X Eqv Y`	True if `X` and `Y` are the same (both True or both False); False otherwise.
`Imp` (Implication)	`X Imp Y`	False only if `X` is True and `Y` is False; True otherwise.
`Not`	`Not X`	True if `X` is False, False if `X` is True.

The logical operators are often used in conjunction with the comparison operators. For example, the following expression evaluates as True only if `x` is equal to 5 and `y` is not equal to 0:

```
(x = 5) And (y <> 0)
```

Operator Precedence and Parentheses

When an expression contains more than one operator, it may not always be clear how the expression evaluates. For example, look at this expression:

```
20 / 4 + 6
```

How should you read this?

- If the addition is performed first, the expression evaluates to 2 (4 plus 6 is 10, 20 divided by 10 is 2)
- If the division is performed first, the result is 11 (20 divided by 4 is 5, 5 plus 6 is 11).

Potentially ambiguous expressions such as this one are resolved by VBA's rules of *operator precedence*, which determine the order in which operations are performed. The precedence of VBA's operators is given in Table 23.3. Operators with lower precedence numbers are performed first.

TABLE 23.3

VBA Operator Precedence

Operator	Precedence
Exponentiation ^	1
Multiplication (*), division (/)	2
Integer division (\)	3
Modulus (Mod)	4
Addition (+), subtraction (-)	5
String concatenation (&)	6

Operators that have the same precedence level, such as multiplication and division, are executed in left-to-right order.

With this information on the precedence rules, you can see that the previous example will evaluate to 11 because the division will be performed before the addition.

You can use parentheses in an expression to modify the order of execution. Those parts of an expression enclosed in parentheses are always evaluated first regardless of operator precedence. Therefore,

```
20 / (4 + 6)
```

evaluates to 2 because the parentheses force the addition to be performed before the division. You can use as many parentheses in an expression as you like as long as they always come in pairs with each left parenthesis having a matching right parenthesis. *Nested parentheses* — when one set is inside another set — execute starting with the innermost set and proceed outward.

Writing Conditional and Loop Statements

An important part of VBA programming is controlling which VBA statements execute and when. VBA has several tools for this purpose, the two most important being loop statements and conditional statements.

Using Loop Statements

A *loop statement* is used to execute a block of VBA statements a certain number of times. There are three loop statements.

For...Next

The `For...Next` statement executes a block of statements a prespecified number of times. It is written like this:

```
For index = start To stop Step step
...
statements
...
Next index
```

- `index` is a numeric variable that serves as the loop counter.
- `start` and `stop` are the starting and ending values of index.
- `step` is the amount that `index` is incremented with each repetition of the loop. If you omit the `step` value, the default increment of 1 is used.

When a `For...Next` loop is encountered, here's what happens:

1. `index` is set to the value of `start`.
2. `index` is compared to `stop`.
3. If `index` is less than or equal to `stop`, the statements in the loop are executed. If not, the loop terminates.
4. `index` is incremented by the value of `step` (or by 1 if `step` is not specified).
5. Return to step 2.

This `For...Next` loop sets the values of the array to 0, 4, 8, ... 200:

```
Dim NewArray(50) As Integer
Dim j As Integer
For j = 0 To 50
    NewArray(j) = j * 4
Next j
```

Code inside the loop should never change the value of the counter variable.

It is possible to use a `For...Next` loop to count down by making `step` negative. When you do this, `start` must be greater than `stop`, and the loop terminates when counter is less than `stop`. In this example, the `For...Next` loop fills the elements of the array with the values 100, 99, ... 0.

```
Dim NewArray(100) As Integer
Dim j As Integer

For j = 100 To 0 Step -1
    NewArray(j) = 100 - j
Next j
```

If you want to exit from a `For...Next` loop early — that is, before the index variable reaches its final value — use the `Exit For` statement.

VBA permits you to nest `For...Next` loops within each other. Each inner loop must be totally within the outer loop.

For Each...Next

You use the `For Each...Next` loop to execute a group of statements once for each member of a collection. It is used to go through a collection and do something to or with each member. The syntax is

```
For Each item in collection
...
statements
...
Next item
```

- `item` is the variable used to iterate through the collection and must be declared as a data type appropriate for the members of the collection. This is usually the same data type as the collection contains, although you can use type `Object` or `Variant` as well.
- `collection` is the name of the collection. The statements are executed once for each element in the collection.

Here's an example that sets the `Color` property of all objects in the collection to `Blue`:

```
Dim o As Object
For Each o In SomeCollection
    o.Color = Blue
Next o
```

You'll see plenty of examples of using `For Each...Next` when you start looking at the Outlook Object Model.

Do...Loop

The `Do...Loop` statement executes a block of statements repeatedly as long as a specified logical condition is met. Depending on how the `Do...Loop` statement is written and where the logical condition is placed, the statements may be executed no times, a single time, or multiple times.

This statement has several slightly different syntaxes. To execute statements repeatedly as long as a logical condition is True, use the `While` keyword:

```
Do While condition
...
statements
...
Loop
```

You can also execute statements repeatedly as long as a condition is False by using the `Until` keyword:

```
Do Until condition
...
statements
...
Loop
```

When program execution reaches the `Do` statement, `condition` is evaluated. If it is True (if using `While`) or False (if using `Until`), the statements are executed and then `condition` is evaluated again. This continues until the value of `condition` changes. Depending on the initial value of `condition`, the statements in the loop may not be executed even once.

You can also write a `Do...Loop` statement that tests `condition` at the end of the loop. As before, you can use either `While` or `Until`:

```
Do
...
statements
...
Loop While condition
```

```
Do
...
statements
...
Loop Until condition
```

When you use this syntax, the statements are executed once and then `condition` is evaluated. By testing `condition` at the end of the loop, you ensure that the statements in the loop will be executed at least once.

To exit a `Do...Loop` early, use the `Exit Do` statement.

Using Conditional Statements

VBA's *conditional statements* are used to execute or not execute a block of statements depending on a program condition. The statements are executed once or not at all. There are two conditional statements in VBA.

If...Then...Else

The `If...Then...Else` statement executes a block of statements if a specified condition is True. Optionally, a second block of statements is executed if the condition is False. The syntax is

```
If condition Then
    block1
Else
```

```
        block2
    End If
```

`condition` is a logical expression. If it is True, the statements in `block1` are executed. If `condition` is False, the statements in `block2` are executed. The `Else` keyword and the second block of statements are optional. If they are omitted, no statements are executed if `condition` is False.

You can test multiple conditions in an `If...Then...Else` statement by using the `ElseIf` keyword. Here's how this is written:

```
If condition1 Then
    block1
ElseIf condition2 Then
    block2
ElseIf condition3 Then
    block3
....
Else
    block4
End If
```

There's no limit to the number of `ElseIf`s. The testing of the various conditions starts at the top and works downward. As soon as a True condition is found, the corresponding block of statements is executed and execution exits the `If` statement. One block of statements at most will be executed regardless of how many of the conditions are True.

When you need to test multiple conditions, it is usually easier to use the `Select Case` statement, covered next.

Select Case

The `Select Case` statement evaluates a single expression and compares the result with a series of templates. If it finds a match, the associated block of statements is executed. The syntax is

```
Select Case expression
    Case template-1
        statements-1
    Case template-2
        statements-2
    ....
    Case template-n
        statements-n
    Case Else
        statements-else
End Select
```

`expression` is evaluated and the result is matched against the various templates, in order from top to bottom. When a match is found, the following block of statements is executed. If no match

is found, the statements following the `Case Else` are executed. The `Case Else` keyword is optional. Even if more than one template matches, only a single block of statements will be executed — the block that follows the first matching template.

Each template in a `Select Case` statement can contain one or more of the following elements:

- **Any expression.** The test expression must match the template exactly.
- **Two expressions separated by the `To` keyword.** The test expression must fall within the range specified by the two expressions. For example, `0 To 50`.
- **The `Is` keyword followed by a comparison operator and an expression.** For example, `Is > 10`.

You can use multiple elements in a template, separating them by commas. This example defines a template that would match if the test expression evaluated to 0, to any value between 5 and 10, or to any value greater than 25:

```
Case 0, 5 To 10, Is > 25
```

Writing Procedures

A *procedure* is a section of VBA code that is independent and has been assigned a name. In fact, every Outlook macro is a procedure, and it is the procedure names that you see listed in the Macros dialog box. However, whereas all macros are procedures, not all procedures are macros. This kind of procedure can be very useful in your VBA programming.

Say you have written a number of macros that manipulate and organize your email, tasks, and so on. Each macro, as part of its operation, needs to sort a list of items into alphabetical order. Rather than including the VBA code that performs the sort in each and every macro, you can place the code in a separate procedure and then call the procedure as needed from each macro.

Subs versus Functions

VBA supports two kinds of procedures, Subs and Functions. They are identical except for the fact that a Function returns data to the calling program, whereas a Sub does not.

To define a Sub procedure, the basic syntax is

```
Sub subname(argumentlist)
...
' Code is placed here
...
End Sub
```

The syntax to define a Function is similar:

```
Function functionname(argumentlist) As type
...
' Code is placed here
functionname = returnvalue

End Function
```

For both types of procedures, the name must follow VBA variable naming rules and also must be unique within the module where the procedure is located. `argumentlist` is an optional list of data passed to the procedure when it is called (as explained in the next section). For a function, the `As type` clause specifies the data type of the function's return value, and the `functionname = returnvalue` statement sets the value of that return value.

Passing Arguments to Procedures

Many procedures have arguments that permit data to be passed to the procedure when it is called. The argument list can include as many arguments as are needed, and has the following syntax:

```
argname1 As type, argname2 As type, .....
```

Here's an example of a function procedure that is passed three numbers and returns the largest one:

```
Function Largest(n1 as Double, n2 As Double, n3 As Double) _
    As Double

    Dim temp as Double
    If n1 > n2 Then
        temp = n1
    Else
        temp = n2
    End If
    If n3 > temp Then
        Largest = n3
    Else
        Largest = temp
    End If

End Function
```

Each argument can be any of VBA's data types, including UDTs, arrays, or enumerations. To specify an array argument, use an empty set of parentheses:

```
Sub ProcessArray(array() As String)
...
End Sub
```

Calling Procedures

Calling a procedure requires a different syntax for Sub and Function procedures. For Sub procedures you have two choices: You can use the `Call` keyword, in which case the argument list must be in parentheses:

```
Call ProcedureName(ArgumentList)
```

Or, you can omit the `Call` keyword and the parentheses as well:

```
ProcedureName ArgumentList
```

Because a function returns a value, it can be treated as an expression and used — that is, called — any place an expression could go. For example:

```
result = Largest(x, y, z)
```

Understanding Procedure Variables

You learned earlier in this chapter how to declare variables in your VBA programs. Most of the variables you use will in fact be declared within procedures. These are called *local variables* and they have some special characteristics that relate to scope.

Scope refers to the parts of a program where a variable is visible. You can use a variable only where it is in scope. In other parts of the program, it is out of scope and might as well not exist. In your VBA programs, you control a variable's scope by where the variable is declared:

- A variable declared within a procedure is visible only within that procedure.
- A variable declared at the *module level* — that is, outside any procedure — is visible in all procedures in that module.

This has implications for the programmer. You can use the same variable name in two or more procedures and they will be totally independent of each other. But what if you have a variable declared within a procedure and also use the same name for a variable declared at the module level? If a procedure contains a variable with the same name as a module-level variable, the local copy takes precedence. Otherwise, the module-level variable is visible within the procedure.

Creating a Procedure

Now that you have learned something about how to write procedures, how do you actually go about it? The VBA Editor makes it easy:

1. In Outlook, press Alt+F11 to open the VBA Editor.
2. If necessary, double-click Module 1 in the Project Explorer to open that module for editing.
3. Select Procedure from the Insert menu to open the Add Procedure dialog box (see Figure 23.1).

4. In the Type section, select either Sub or Function depending on the type of procedure you want.
5. Type the procedure name in the Name box.
6. Click OK. The editor creates the shell of the Sub or Function procedure, ready for you to edit.

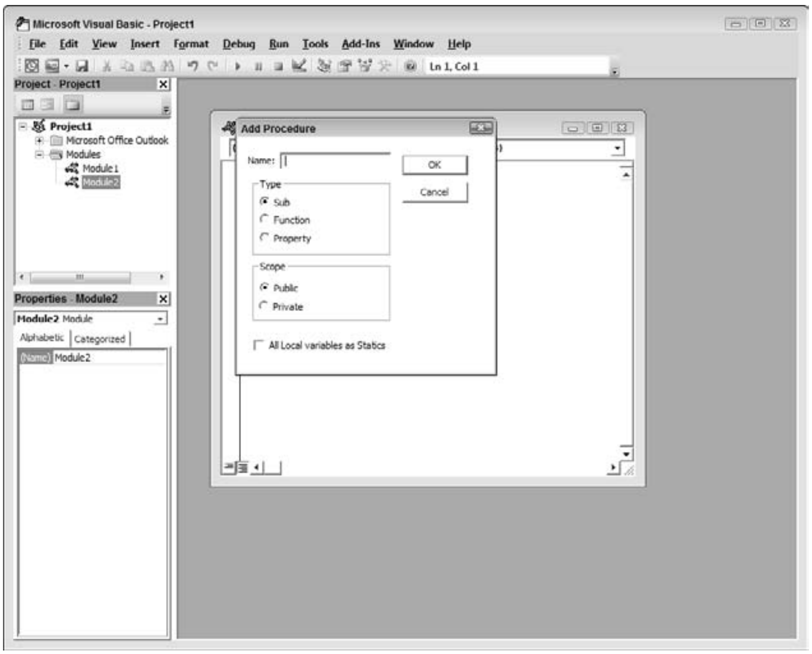
Procedures versus Macros

What is it that differentiates a macro procedure from a non-macro procedure? The main difference is whether you intend the user to execute the procedure directly from the Macros dialog box. In order to be considered a macro by Outlook and to be listed in the Macros dialog box, a procedure must meet two criteria:

- It must not return a value — that is, it must be a Sub procedure and not a Function procedure.
- It must not take any arguments.

FIGURE 23.1

Adding a Sub or Function procedure to a VBA module.



Suppose, however, that you wrote a Sub procedure that takes no arguments, yet you do not want it listed in the Macros dialog box. You can "hide" it by using the `Private` keyword:

```
Private MySub()
...
End Sub
```

Now your other macro code will be able to call this Sub, but the user will not be able to execute it from the Macros dialog box.

Interacting with the User

Sometimes your macro will need to get some information from the user. Perhaps it needs to prompt for a name, or to get a Yes/No answer. VBA provides two tools for this purpose, `MsgBox` and `InputBox`.

The MsgBox Function

The `MsgBox` function displays a dialog box with a message and one or more buttons. The function's return value indicates which of the buttons the user clicked. You use this function as follows (I have omitted a couple of optional and rarely used arguments):

```
MsgBox(prompt, buttons, title)
```

- `prompt` is a string expression specifying the message to display in the dialog box.
- `buttons` is an optional argument specifying what buttons and/or icons to display in the dialog box and, when there is more than one button, which one is the default (the default is the one selected if the user presses Enter). If this argument is omitted, only an OK button is displayed. The possible settings for this argument are given in Table 23.4. To combine settings, use the Or operator.
- `title` is an optional argument that specifies the title displayed in the dialog box's title bar. If this argument is omitted, the application name is used as the title.

TABLE 23.4

Defined Constants for the MsgBox Function's buttons Argument

Constant	Value	Description
vbOKCancel	1	Display OK and Cancel buttons
vbAbortRetryIgnore	2	Display Abort, Retry, and Ignore buttons
vbYesNoCancel	3	Display Yes, No, and Cancel buttons

Constant	Value	Description
vbYesNo	4	Display Yes and No buttons
vbRetryCancel	5	Display Retry and Cancel buttons
vbCritical	16	Display Critical Message icon
vbQuestion	32	Display Warning Query icon
vbExclamation	48	Display Warning Message icon
vbInformation	64	Display Information Message icon
vbDefaultButton2	256	Second button is default
vbDefaultButton3	512	Third button is default

As mentioned, the function's return value indicates which of the buttons the user selected. The possible return values are represented by the constants shown in Table 23.5.

TABLE 23.5

Defined Constants for the MsgBox Function's Return Value

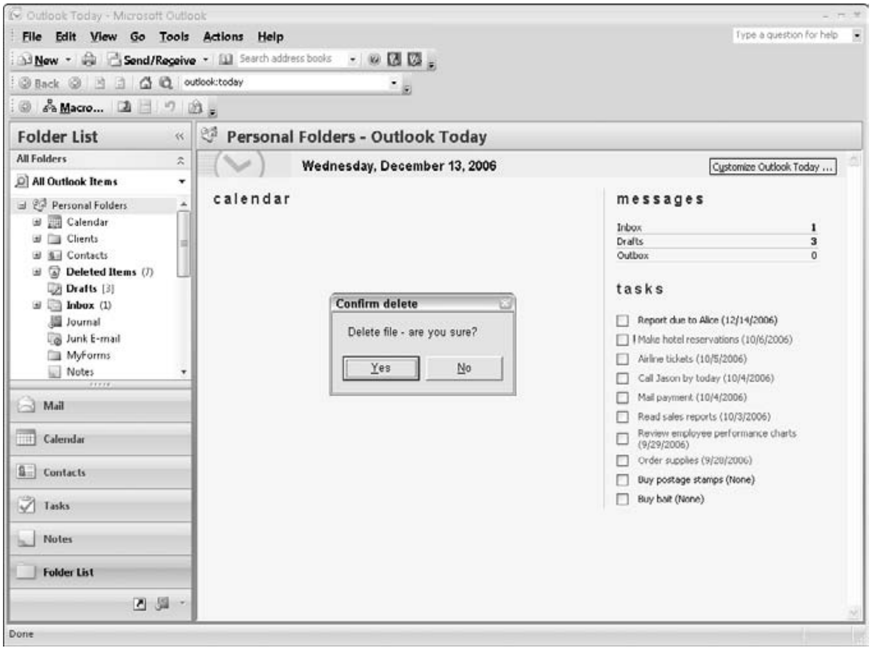
Constant	Value	Button Selected
vbOK	1	OK
vbCancel	2	Cancel
vbAbort	3	Abort
vbRetry	4	Retry
vbIgnore	5	Ignore
vbYes	6	Yes
vbNo	7	No

To use the `MsgBox` function, call it with the appropriate arguments and then test the return value. Here's an example, with the displayed dialog box shown in Figure 23.2:

```
Dim retval As Integer
retval = MsgBox("Delete file - are you sure?", vbYesNo, _
   "Confirm delete")
If retval = vbYes Then
    ' Code to delete file goes here.
End If
```

FIGURE 23.2

An example of a dialog box displayed by the MsgBox function.



The InputBox Function

You use the `InputBox` function to return a string entered by the user. The syntax for this function is (I have omitted some optional and rarely used arguments):

```
InputBox(prompt, title, default,)
```

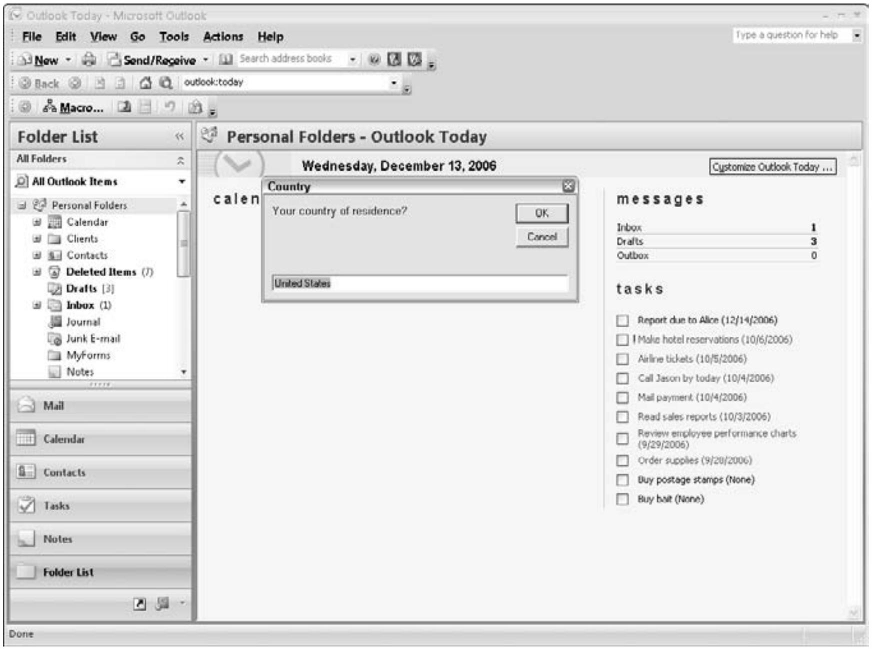
- `prompt` is the text displayed as the prompt in the dialog box.
- `title` is an optional argument that specifies the title displayed in the dialog box's title bar. If this argument is omitted, the application name is used as the title.
- `default` is an optional string expression that specifies the default response if the user does not enter one. If this argument is omitted, the default response is an empty string.

This code uses the `InputBox` function to get the user's country of residence, with "United States" being the default response. The displayed dialog box is shown in Figure 23.3.

```
Dim Country As String
Country = InputBox("Your country of residence?",  "Country", _
    "United States")
```

FIGURE 23.3

Getting user input with the InputBox function.



Summary

This chapter has provided you with a quick introduction to programming macros with the VBA language. This information is sufficient to get you started writing your own macros (although you should read the next chapter before getting started). There's lots more to the VBA language, aspects that could not be covered here due to space limitations. You can further explore VBA on your own using the VBA Editor documentation, online resources, or books published on the subject.

Chapter 24

Understanding the Outlook Object Model

In order to program Outlook with macros, it is necessary to have some understanding of the Outlook Object Model. Though this may sound intimidating, it is actually a great help to the macro programmer and makes your job much easier.

This chapter gives you an overview of programming the Outlook Object Model and presents numerous examples. The focus is on programming mail items and calendar items because it is these two aspects of Outlook that benefit the most from macro programming. The next chapter develops a few of the programming concepts presented here into full VBA applications you can use or modify.

IN THIS CHAPTER

Understanding Office Objects

All Office programs operate on the principle of objects. This means that internally, all the various components of the program are represented by their own kind of object. In Word, for example, a paragraph is an object, a table is an object, and an entire document is an object. In Excel, a worksheet is an object, and charts and cells are objects, too. Outlook works the same way.

From the perspective of the end user, the fact that a program is structured as objects does not make any practical difference. For the macro programmer, however, it makes a world of difference because all the objects are available for you to use in your macros. Each type of object has a great deal of functionality built in, and that functionality is all ready for you to use with very little programming effort. To be an effective macro programmer, therefore, you need to know about the Outlook Object Model.

Creating Object References

Before you can work with an object in your VBA code, you must have a reference to it. A *reference* is simply a variable name. Instead of holding data, however, an object reference lets you work with an object in your code.

There are two parts to obtaining an object reference. First, you must create a variable that is of the proper type to hold a reference to the specific kind of object you are dealing with. The preferred way to do this is as follows:

```
Din RefName As type
```

This looks like a regular `Dim` statement for declaring a variable — and in fact, it is the same except that `type` refers to the specific type of object and not to a data type. For example, in the Outlook Object Model the object type `MailItem` represents an email message. To declare a variable that can reference a message, you would write the following:

```
Dim MyMessage As Outlook.MailItem
```

Note that the Outlook prefix to the object name is used to ensure that you are referencing the Outlook Object Model, because some object names are duplicated between programs.

At this point you have a name that can refer to the specified type of object — `Outlook.MailItem` in this case — but it does not yet refer to an actual object. Your next step will take one of two paths depending on your needs.

First, you can create a new object of the specified type and set the variable name to refer to it. You do this with the `Set` and `New` keywords:

```
Set RefName = New type
```

Object Creation Shortcut

Rather than using separate `Dim` and `Set` statements, you can combine them using the following syntax:

```
Dim RefName As New Type
```

As before, however, this works only for some types of objects.

The Nothing Keyword

VBA has a special keyword, `Nothing`, that indicates that an object reference does not contain a valid reference to an object. When an object reference has been declared but not initialized, it contains `Nothing`. You can also explicitly set an object reference to `Nothing` when you are finished using the object or to make sure the reference does not point at a valid object:

```
Set objRef = Nothing
```

The `Is Nothing` operator lets you test for this value:

```
If objRef Is Nothing Then
  ' Actions to take if the reference is not valid.
Else
  ' Actions to take if the reference points to a valid object.
End If
```

However, this technique cannot be used with many kinds of objects, including `MailItem`. Rather, you must get a reference to an instance of the object using the Outlook Object Model. For example, you cannot create a new `MailItem` object with the following code:

```
Set MyMessage = New Outlook.MailItem
```

You see exactly how to create references to Outlook objects throughout the chapter.

Working with Collections

Collections are an important part of Outlook macro programming. Whenever the Object Model requires more than one of something, it uses a collection to keep track of them. For example, in Outlook each mail folder, such as the Inbox, is represented by an object. A folder can contain any number of email messages, and these messages are represented as a collection. Collections are designed with built-in tools that make is easy to find an individual object in the collection or to do something with all of the objects in the collection. Every collection has the `Count` property, which tells you the number of elements in the collection.

The most common use for collections is when you want to process every item in the collection. For example, suppose you want to write a macro that looks at every email message in the Inbox and moves those messages from a certain sender to another folder. By looping through the collection of email messages in this folder, the task is easily accomplished no matter how many or few messages there are in the folder. You use the `For Each...Next` loop, introduced in Chapter 23, for this purpose.

Collection Naming Conventions

By tradition, a collection is named with the plural of the object it contains. For example, a collection that holds `Folder` objects will be called `Folders`. Unfortunately there are a few exceptions to this rule that you'll encounter as you explore the Outlook Object Model.

First, you must declare an object variable of the same type as the objects in the collection. Continuing with the email example:

```
Dim msg As Outlook.MailItem
```

Then create a reference to the object that contains the collection — in this case, an Outlook folder — specifically, the Inbox:

```
Dim f As Outlook.Folder
Dim MyOutlookNamespace As Outlook.NameSpace
Set MyOutlookNameSpace = GetNameSpace("MAPI")
Set f = MyOutlookNameSpace.GetDefaultFolder(olFolderInbox)
```

Finally, loop through the collection as follows:

```
For Each msg in f.Items
  ' With each repetition of the loop, msg refers to the   ' next
message in the collection.
Next
```

The previous code examples are missing a couple of details and will not actually run, but they serve to illustrate the principle of collections. You'll note that this is one of those exceptions where a collection — `Items` in this case — is not named as the plural of the kind of object it contains, `MailItems`.

Using Named Constants

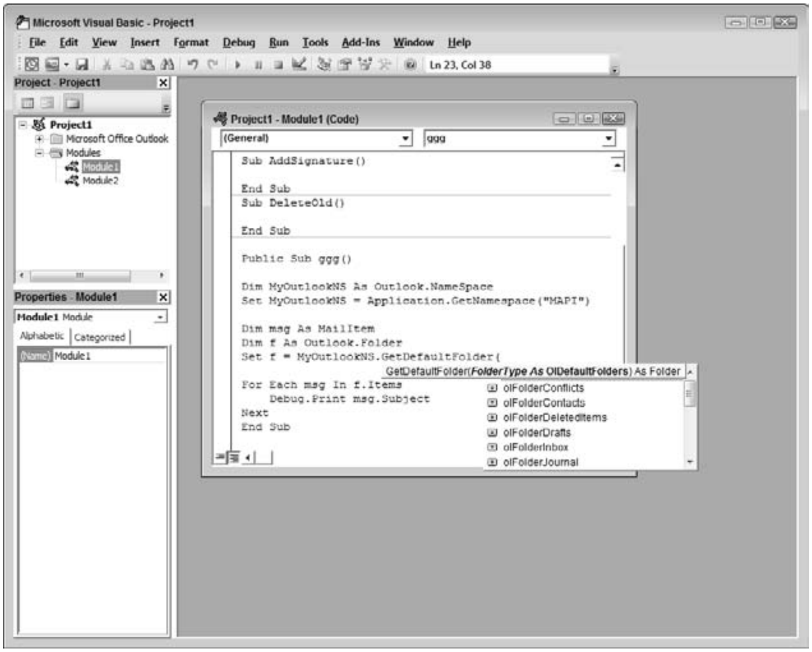
If you examine the previous code snippet, you'll see this line of code:

```
Set f = GetDefaultFolder(olFolderInbox)
```

What is `olFolderInbox`? It's not a variable that you have declared. Rather it's one of the named constants in the Object Model. Some methods (a procedure that is part of an object) require an argument to tell them what to do. Rather than use hard-to-remember numbers, the Object Model provides these descriptive constants that are a lot easier to remember. What's more, the VBA Editor's IntelliSense feature will list the available constants as you are typing in your code, as shown in Figure 24.1.

FIGURE 24.1

The editor's IntelliSense feature lets you select from a list of named constants.



The Outlook Object Model Hierarchy

The Object Models for all Office applications are arranged in a hierarchical structure. Two of the top-level objects in this arrangement are `Application` and `Namespace`.

The Application Object

At the very top of the Outlook Object Model is the `Application` object. As you might have already guessed, this object represents the Outlook application itself. All other objects in the hierarchy are subsidiary to the `Application` object. Often, when you are trying to locate data in Outlook, you start with the `Application` object and work down to levels of greater detail.

The `Application` object is available as an implicit reference for VBA code in Outlook. This means that you do not have to use the term in your code — it is understood automatically. If you were writing VBA code to run in another Office application, such as Word, you would have to explicitly reference the Outlook `Application` object.

For example, the `GetNamespace()` method is part of the Outlook `Application` object. Full syntax for this would be

```
Application.GetNamespace()
```

but because of the implicit availability of the `Application` reference, you can write it like this:

```
GetNamespace()
```

The Namespace Object

Another high-level object in the Outlook Object Model is the `Namespace` object. It exists because Outlook was designed to be usable with different kinds of data, each of which would be identified by its own namespace. So far, only one kind of data is supported in Outlook, MAPI data (MAPI stands for Messaging Application Programming Interface). Therefore there is only one namespace. Though it seems like unnecessary effort, you must use this namespace when accessing email and other items in Outlook. In many of the code examples in this and later chapters, you'll see a few lines of code like this:

```
Dim MyOutlookNamespace As Outlook.Namespace
Set MyOutlookNamespace = GetNamespace("MAPI")
```

Then, the `Namespace` object is used when accessing mail and other folders:

```
Set f = MyOutlookNS.GetDefaultFolder(olFolderInbox)
```

Getting References to Outlook Folders

Outlook items are all stored in folders, and before you can work with items you need to get a reference to the containing folder. Outlook has two types of folders: the default folders and user-created folders.

Referencing Default Folders

A *default folder* is one of the folders that is part of Outlook and cannot be deleted, such as the Inbox, the Deleted Items folder, and the Notes folder. To get a reference to one of these folders, which are represented by the `Folder` object, you use the `GetDefaultFolder()` method. This method takes one argument that specifies the folder you are interested in:

```
Dim folder As Outlook.Folder
Set folder = MyOutlookNamespace.GetDefaultFolder(foldertype)
```

The `foldertype` argument can be one of the named constants listed in Table 24.1, along with the folder each returns. This table lists only those constants used frequently; you can refer to online help for the complete list.

Referencing the MAPI Namespace

In some of the code examples in this and following chapters, you'll see code that explicitly gets the `MAPI` namespace. In other code, particularly short snippets, it will be assumed that this has already been done.

TABLE 24.1

Constants for the GetDefaultFolder Method's *foldertype* Argument

Constant	Folder Containing
`olFolderCalendar`	Calendar items
`olFolderContacts`	Contacts
`olFolderDeletedItems`	Items that have been deleted
`olFolderDrafts`	Drafts of incompleted items
`olFolderInbox`	Received email messages
`olFolderJournal`	Journal entries
`olFolderNotes`	Note entries
`olFolderOutbox`	Email messages waiting to be sent
`olFolderSentMail`	Email messages that have been sent
`olFolderTasks`	Task entries

Referencing User-Created Folders

Folders that the user has created are not default Outlook folders and references to them are obtained from the `Folders` collection. Because folders can themselves be organized in a hierarchy, things are arranged as follows:

- Each top-level folder is a member of the `NameSpace` object's `Folders` collection.
- Each of these top-level folders has its own `Folders` collection, which contains any subfolders that the folder contains.
- Each folder in turn has its own `Folders` collection.

User-created folders are identified by name, which is obtained from the `Folder` object's `name` property. To get a reference to a folder, assuming that you do not know exactly where it is located, you must look through all folders until you either find it or run out of places to look. This

technique can locate the default folders as well, based on their name, but the technique using the `GetDefaultFolder()` method, described in the previous section, is easier to use.

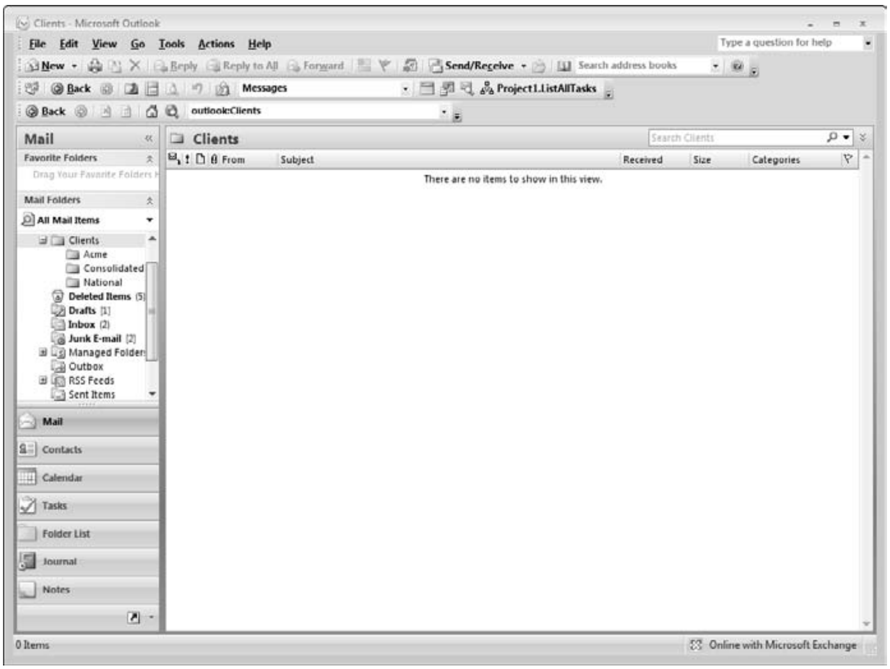
In the folder hierarchy, what the user considers a top-level folder is in fact a second-level folder. Thus, for example, in the folder structure shown in Figure 24.2, Clients is considered a second-level folder and Acme, Consolidated, and National are third-level folders. The top-level folders are Personal Folders, Archive Folders, Internet Calendar, and similar items.

To get a reference to a specific folder, you can use the function in Listing 24.1. This function is passed the name of the desired folder and returns a reference to the desired folder, if it exists, or else the value `Nothing`. Be aware that folder names in Outlook are case-sensitive. If the folder does not exist, the value `Nothing` is returned. You can check for the `Nothing` value using `Is Nothing` as explained earlier in this chapter.

This function looks at second- and third-level folders but does not go any deeper. Thus, looking at the folder structure in Figure 24.2 the function would find Clients, and it would find Acme, Consolidated, and National, but it would not find any folders nested deeper than that. It could easily be modified to do so, however, and that would be a good programming exercise for you.

FIGURE 24.2

Understanding Outlook folder levels.



LISTING 24.1

A Function to Obtain a Reference to a User-Created Folder

```
Public Function FindFolder(FolderName As String) _
    As Outlook.Folder

Dim folder1 As Outlook.Folder
Dim folder2 As Outlook.Folder
Dim folder3 As Outlook.Folder
Dim FoundFolder As Outlook.Folder
Dim MyOutlookNamespace As Outlook.NameSpace

Set MyOutlookNamespace = GetNamespace("MAPI")
Set FindFolder = Nothing

For Each folder1 In MyOutlookNamespace.Folders
    ' We know that top-level folders will not match
    ' so no comparison is needed here.
    For Each folder2 In folder1.Folders
        If folder2.Name = FolderName Then
            Set FindFolder = folder2
            Exit Function
        End If
        For Each folder3 In folder2.Folders
            If folder3.Name = FolderName Then
                Set FindFolder = folder3
                Exit Function
            End If
        Next
    Next
Next

End Function
```

Working with Folder Items

Every folder can contain items, and the purpose for getting a reference to an Outlook folder is almost always to do something with the items that it contains. With user-defined folders, you specify the type of Outlook item the folder will contain when you create the folder. When you are working with a folder in VBA, you may want to determine its default type of item. For example, perhaps you are writing a macro that will look for certain information in all email messages in all folders. You can iterate through all Outlook folders using the techniques described earlier in this chapter, and then process the folder items only if its default item type is email.

To determine a folder's default item type, look at its `DefaultItemType` property. The values that can be returned are represented by named constants as described in Table 24.2. This property is read-only, which means that you cannot change it.

TABLE 24.2

Named Constants for the Folder Object's DefaultItemType Property

Constant	Value	Meaning
`olAppointmentItem`	1	Appointment items
`olContactItem`	2	Contact items
`olDistributionListItem`	3	Exchange distribution list items (relevant to Exchange Server accounts only)
`olJournalItem`	4	Journal items
`olMailItem`	5	Mail items (email messages)
`olNoteItem`	6	Note items
`olPostItems`	7	Post items (an item posted to a public folder)
`olTaskItems`	8	Task items

Programming Email Items

In Outlook, an email message is represented by the `MailItem` object. Once you have a reference to a folder containing email items, you can loop through the folder's `Items` collection to access each email in turn. You can also create macros that compose and send email messages.

Working with Received Messages

Many of the things you'll do with email messages that you have received involve message properties that provide information about the subject, recipients, sender, and other aspects of the message. The `MailItem` properties used most often when working with received messages are described in Table 24.3.

TABLE 24.3

MailItem Properties Used When Working with Received Messages

Property	Description
`Attachments`	A collection of `Attachment` objects, each representing a document or link attached to the message.
`Body`	Text of the message (if the message is in plain text format).
`CreationTime`	The date when the message was created (as a type `Date`).

Property	Description
`HTMLBody`	The text of the message (if the message is in HTML format).
`Importance`	Returns the importance level of the message as one of the following values: `olImportanceHigh`, `olImportanceLow`, and `olImportanceNormal`.
`ReceivedTime`	Returns the date specifying when the message was received (as a type `Date`).
`Recipients`	A collection of `Recipient` objects representing the message recipients.
`Saved`	True if the message has been saved since it was last modified, False otherwise.
`SenderName`	The display name of the message sender.
`SentOn`	The date when the message was sent (as a type `Date`).
`Subject`	The message subject.
`To`	A semicolon-delimited list of the message recipients' display names.
`UnRead`	Returns True if the message has not been opened. False if it has been.

Next look at some examples of writing macros to perform useful, everyday tasks in Outlook.

Moving Selected Messages

One way you can use macros is to go through any folder containing email messages, typically the Inbox, and move messages to various other folders depending on their sender, subject, or other characteristics.

The first step in doing this is to get a reference to both folders. You have already seen how to get a reference to the Inbox using the `GetDefaultFolder()` method, and how to get a reference to a user-created folder using the `FindFolder()` procedure presented earlier in this chapter.

Next you must loop through all the messages in the Inbox, checking each one to see whether it meets the criterion for being moved. You use a `For Each...Next` loop for this purpose. For this code snippet, assume that:

- `fInbox` is a reference to the Inbox.
- The variable `m` has been declared as type `Outlook.MailItem`.
- The variable `Subject` holds the text you want to look for.

```
For Each m In fInbox.Items
    If InStr(m.Subject, Subject) > 0 Then
        ' Move the message here.
    End If
Next
```

Note the use of the `Instr()` function. This is one of VBA's built-in string functions. It looks for one string in another and returns a value greater than 0 if it is found. In this example you use `Instr()` to see whether the subject text you are looking for, in the variable `Subject`, is found in the message's subject, obtained as the `m.Subject` property.

The final step is moving the message. This is easily done with the `Move` method. If `fDestination` is the folder you want to move the message to, and `m` is a reference to the message, you would write:

```
m.Move fDestination
```

There's a small wrinkle, however. If you move a message out of the Inbox before you have completed looping through all the messages, the `For Each...Next` loop can sometimes be thrown off and the process will not be completed properly. For this reason, it is necessary to keep a list of the messages to be moved without actually moving them until the `For Each...Next` loop has finished looking through the Inbox. You see how this is done in the full application presented in Chapter 25.

Dealing with Attachments

An email message can contain one or more attachments. An *attachment* can be either an actual file or a link to the file location. A `MailItem` object, representing an email message, has the `Attachments` collection, which contains one `Attachment` object for each attachment associated with the message.

When you are dealing with a received message, you can determine how many attachments the message has from the `MailItems.Attachments.Count` property. If this property returns a non-zero value, you can loop through the attachments using a `For Each...Next` loop:

```
Dim at As Outlook.Attachment
For Each at in MyMailItem.Attachments
  ' Deal with each attachment here.
Next
```

The `Attachment` object has the following properties that you can use to work with it:

- `DisplayName`: The name that Outlook displays below the attachment's icon when the message is displayed on-screen. This is often, but not necessarily, the same as the attachment's filename.
- `FileName`: The filename of the attachment.
- `PathName`: The full path to an attached linked file. This property is valid only for linked attachments.
- `Type`: The type of the attachment. Possible settings are `olByValue` (an attached file), and `olByReference` (a link to a file).

To save an attached file (but not a linked file) to disk, call its `SaveAsFile` method. This method's one argument is the path and filename for the file. You can, but do not have to, use the original

attachment filename when saving, as shown in this example, which saves all attachments to disk under their original name and using the specified path:

```
Dim at As Outlook.Attachment

For Each at in MyMailItem.Attachments
    If at.Type = olByValue Then
        at.SaveAsFile("c:\data\" & at.FileName)
    End If
Next
```

Creating and Sending Messages

In addition to processing received messages, you can write macros that create and send email messages. Outlook's Object Model makes the task relatively simple. The `MailItem` object has some properties mostly relevant when you are creating a new message to send. These properties are described in Table 24.4.

TABLE 24.4

Properties of the MailItem Object for Creating and Sending Messages

Property	Description
`Attachments`	A collection that contains one `Attachment` object for each file attached to the message.
`BCC`	A semicolon-delimited list of display names for the blind carbon copy (BCC) recipients.
`Body`	The text of the message for plain text messages.
`CC`	A semicolon-delimited list of display names for the carbon copy (CC) recipients.
`HTMLBody`	The text of the message for HTML format messages.
`ReadReceiptRequested`	Set to True in order to request a read receipt for the message, False by default.
`Recipients`	A collection that contains one `Recipient` object for each message recipient.
`SaveSentMessageFolder`	The Outlook folder where a copy of the message will be saved when it is sent. The default is the Sent Items folder.
`Sent`	True if the message has been sent, otherwise False.
`To`	A semicolon-delimited list of display names for the message recipients.

The general procedure for creating and sending an email message is as follows:

1. Create a new `MailItem` object.
2. Put the message text in the `Body` property (for plain text messages) or `HTMLBody` property (for HTML format messages).
3. Put the message subject in the `Subject` property.
4. Put one or more recipients in the `Recipients` collection.
5. Call the `MailItem` object's `Send()` method.

The following sections look at some details.

Creating a New Message

As mentioned, creating a new message means creating a new `MailItem` object. However, you cannot do this in the usual way using the `New` keyword. Rather, you must use the `CreateItem()` method as shown here:

```
Dim msg As Outlook.MailItem
Set msg = CreateItem(olMailItem)
```

Once you have the new `MailItem`, you can address, compose, and send it.

Addressing the Message

Each recipient of a message is represented by a `Recipient` object. All message recipients are placed in the `MailItem` object's `Recipients` collection. This is true for regular "To" recipients as well as CC and BCC recipients. Whether a given recipient is To, CC, or BCC is controlled by its `Type` property.

To add a recipient to message, call the `Add()` method of the `MailItem.Recipients` collection and pass it the recipient's email address. This method returns a reference to the new recipient, which you'll need as I soon show you. Assume that `msg` refers to the new `MailItem` object created as described in the previous section:

```
Dim recip As Outlook.Recipient
Set recip = msg.Recipients.Add("someone@somewhere.net")
```

By default, new recipients are considered "To" recipients. To change a recipient to CC or BCC, set the `Recipient.Type` property to either of the named constants `olCC` or `olBCC`:

```
recip.Type = olCC
```

You can also add a recipient based on his or her display name as shown here:

```
Dim recip As Outlook.Recipient
Set recip = msg.Recipients.Add("Jane Austin")
```

No Need to Resolve?

You do not need to resolve a recipient if you specified the actual email address when you added the recipient to the message's `Recipients` collection.

When you use this approach, the recipient must be *resolved* before you can send the message. This procedure looks through the Outlook address book for the specified display name. If it is found, the corresponding email address is added to the recipient and you can send the message. If a message has one or more unresolved recipients, trying to send it will cause an error.

To resolve a recipient, call the `Resolve()` method. The method returns True if the resolution was successful, False if not. Here's an example:

```
Dim recip As Outlook.Recipient
Set recip = msg.Recipients.Add("Jane Austin")
If recip.Resolve Then
  ' Resolved OK - safe to send.
Else
  ' Resolution failed - take steps to correct.
End If
```

Adding Attachments to a Message

When you are writing VBA code to create email messages, you can add attachments to each message as desired. You use the `Attachments` collection's `Add()` method, which has the following syntax:

```
MailItem.Attachments.Add(Source, Type, Position, DisplayName)
```

- `Source` is a required argument specifying the path and name of the file to attach.
- `Type` is an optional argument specifying the type of the attachment: `olByValue` (for an attached file) or `olByReference` for a link (shortcut) to a file. The default is `olByValue`.
- `Position` is an optional argument specifying the position of the attachment in the message. The default is for attachments to be placed at the end of the message.
- `DisplayName` is an optional argument giving the attachment's display name. If this argument is omitted, the name of the file will be used as the display name.

It is recommended to save a message before adding or removing attachments. Here's a code example that attaches two file attachments to a message:

Using Your Address Book

Your macro code can also get email addresses from the address book. You see an example of this in Chapter 25 when I present a VBA application that sends a message to all contacts in a specified address book.

```
MyMailMessage.Save
With MyMailMessage.Attachments
    .Add "c:\data\TechnologyWhitePaper.doc", olByValue, , _
        "White Paper"
    .Add "c:\data\MedicalExpenses.xls"
End With
```

Completing and Sending a Message

Other than addressing an email message, a message needs a subject line and a body. The subject is set by assigning text to the `MailItem.Subject` property.

The body is not quite so simple because you have the option of sending a plain text format message, a Rich Text Format (RTF) message, or an HTML format message. When you create a new `MailItem` object, the format is set to the default message format as specified in Outlook's mail options (refer to Chapter 5 for more information). To change the format for an individual message, set the `MailItem.BodyFormat` property to one of these constants: `olFormatHTML`, `olFormatPlain`, or `olFormatRichText`.

You assign the actual body of the message to either the `Body` property or the `HTMLBody` property depending on whether or not the text includes HTML formatting tags. Of course, the `HTMLBody` property is irrelevant for a plain text format message.

Finally, call the `MailItem.Send()` method to send the message.

Programming Calendar Items

The first thing you must do to work programmatically with calendar items is to get a reference to the Calendar folder. Because this is one of Outlook's default folders, you obtain this reference using the `GetDefaultFolder()` method just like you learned earlier in this chapter for the Inbox folder:

```
Dim MAPINameSpace As Outlook.NameSpace
Dim CalendarFolder As Outlook.Folder
Set MAPINameSpace = GetNameSpace("MAPI")
Set CalendarFolder = _
    MAPINameSpace.GetDefaultFolder(olFolderCalendar)
```

Once you have this reference, you can start accessing the individual calendar items. Though several kinds of objects can be present in the Calendar folder, the most important one is the `AppointmentItem` object, which represents one-time appointments, recurring appointments, all-day events, and multi-day events. This object has a set of properties that hold information about the appointment. The `AppointmentItem` properties that you are most likely to need in your macro programming are described in Table 24.5.

TABLE 24.5

Properties of the AppointmentItem Object

Property	Description
`AllDayEvent`	True if the appointment is an all-day event, in which case the start and stop times are ignored.
`Body`	The main body of the appointment.
`Categories`	Holds information about the appointment category, if any.
`CreationTime`	Returns a date value indicating the date and time when the appointment was created.
`Duration`	The duration of the appointment, in minutes.
`End`	A date value specifying the ending date/time for the appointment.
`Importance`	Specifies the importance of the appointment. Possible values are indicated by the constants `olImportanceLow`, `olImportanceNormal`, and `olImportanceHigh`.
`IsRecurring`	True if the appointment is recurring.
`Location`	Specifies the location of the event.
`ReminderMinutesBeforeStart`	The number of minutes before the start of the appointment that the reminder is to be displayed.
`ReminderSet`	A True/False value specifying whether a reminder will be displayed before the appointment start time.
`Start`	A date specifying the starting date/time for the appointment.
`Subject`	The subject of the appointment.

Creating a New Appointment

To create a new appointment, you use the `CreateItem()` method. The syntax is

```
Dim NewAppt As Outlook.AppointmentItem
Set NewAppt = CreateItem(olAppointmentItem)
```

The new appointment is, of course, blank — you must fill in the various details such as subject, start/stop times, and whether a reminder will be displayed. A new appointment created in code is not visible on the screen. There are two approaches to filling in the details of a new appointment.

You can do it all in code without ever making the appointment visible to the user. In this case you must save the appointment by calling the `Save()` method:

```
Dim NewAppt As Outlook.AppointmentItem
Set NewAppt = CreateItem(olAppointmentItem)
NewAppt.Subject = "Sales review meeting"
NewAppt.Location = " Conference Room B"
NewAppt.Start = #9/26/2006 1:00:00 PM#
NewAppt.End = #9/26/2006 3:00:00 PM#
NewAppt.Body = "Make sure to bring the worksheet."
NewAppt.Save
```

The other approach is to display the appointment to the user by calling its `Display()` method. The user fills in the appointment details and saves it by clicking the Save & Close button, as usual.

Accessing Existing Appointments

You access existing appointments using the Calendar folder's `Items` collection. You can retrieve an appointment based on its subject. Here's how to retrieve an appointment by its subject, in this case "New Employee Training" (assume that `CalendarFolder` is a reference to Outlook's Calendar folder):

```
Dim MyAppt As Outlook.AppointmentItem
Set MyAppt = CalendarFolder.Items("New Employee Training")
```

The problem with this approach is that if there are multiple appointments with the same subject, it retrieves only the first one. It is preferable to loop through all the appointments in the folder with a `For Each...Next` statement, looking for one or more appointments of interest. Here's an example that sets the variable `MyAppt` to point at the first appointment that has "New Employee Training" as its subject. If there is no such appointment, a message is displayed alerting the user.

WARNING **If you try to retrieve an appointment by subject and there is no matching appointment, a runtime error occurs. This error can be trapped, but it is better to avoid trying to retrieve individual appointments in this manner.**

```
Dim MyAppt As Outlook.AppointmentItem
Dim Appt As Outlook.AppointmentItem
Dim Found As Boolean

Found = False
For Each Appt In CalendarFolder.Items
    If Appt.Subject = "New Employee Training" Then
        Found = True
        Set MyAppt = Appt
```

```
        End If
    Next

    If Found Then
        ' Process the matching appointment here.
    Else
        MsgBox "Appointment 'New Employee Training' not found."
    End If
```

A Calendar Demonstration

Chapter 25 presents a complete calendar application that creates and prints a document listing all the appointments for the upcoming week. This demonstration also shows you how an Outlook VBA program can control other Office applications.

Summary

The Outlook Object Model is central to any macros or VBA applications that you create in Outlook. The objects represent all the various components in Outlook — folders, messages, appointments, and so on. The functionality built in to these objects is available for you to use in your VBA code.

Chapter 25

Programming Outlook with VBA: Some Examples

In the previous two chapters, you learned a lot of details about the VBA programming language and the Outlook Object Model. This information is essential, but it can also be a terrific learning aid to see these concepts put into use in a real-world situation. To this end, this chapter presents two complete and tested Outlook VBA applications that perform tasks that Outlook users really might want to perform. You can use these projects as-is, modify them to suit your specific needs, or simply use them as learning aids.

IN THIS CHAPTER

Organizing email messages by subject

Listing the next week's appointments

Organizing Email Messages Based on Subject

You had an introduction to this project in Chapter 24. This chapter goes into a lot more detail and presents a complete, working application.

At the heart of this application is a VBA function called `MoveMessagesBySubject()`. It takes two arguments:

- The text that you are searching for
- The name of the destination folder

The function's return value is type Boolean. It returns True if the code completes successfully and False if there was a problem. The most likely problem that might occur is that the destination folder cannot be found. However, the function includes error handling code to deal with unforeseen errors.

The function `MoveMessagesBySubject()` is presented in Listing 25.1. Note that this function calls the function `FindFolder()`, which was presented in Chapter 24. In other words, `FindFolder()` must be in the same module as `MoveMessagesBySubject()` or you will get an error message.

LISTING 25.1

The MoveMessagesBySubject() Function

```
Public Function MoveMessagesBySubject(Subject As String, _
    DestinationFolder As String) As Boolean

' Moves all messages from the Inbox to the specified folder
' if the message subject contains the text in the Subject
' argument.
' Returns True on success, False on error.

' Requires access to the function FindFolder() to run.

    Dim fInbox As Outlook.Folder
    Dim fDestination As Outlook.Folder
    Dim m As Outlook.MailItem
    Dim MyOutlookNamespace As Outlook.NameSpace
    Dim FoldersToMove As New Collection

    'Obtain the required MAPI namespace.
    Set MyOutlookNamespace = GetNamespace("MAPI")

    ' Set up error handling.
    On Error GoTo ErrorHandler

    ' Get the references to the Inbox and destination folders.
    Set fInbox = MyOutlookNamespace.GetDefaultFolder(olFolderInbox)
    Set fDestination = FindFolder(DestinationFolder)

    ' If destination folder not found, display
    ' message and exit.
    If fDestination Is Nothing Then
        MsgBox ("The destination folder could not be found.")
        MoveMessagesBySubject = False
        Exit Function
    End If

    ' Now loop through the Inbox looking at each mesasage.
    For Each m In fInbox.Items
        If InStr(m.Subject, Subject) > 0 Then
            ' Add message to the "to be moved" collection.
            FoldersToMove.Add m
        End If
```

```
    Next

    ' If any matching messages were found, move them.
    If FoldersToMove.Count > 0 Then
        For Each m In FoldersToMove
            m.Move fDestination
        Next
    Else
        MsgBox "There are no messages to move."
    End If

    MoveMessagesBySubject = True

ErrorExit:
    Exit Function

ErrorHandler:
    MoveMessagesBySubject = False
    Resume ErrorExit

End Function
```

You should note two things about this function. First, it uses the function `FindFolder()` to obtain a reference to the destination folder. This function was presented in Chapter 24. It must be available in your Outlook project.

Second, you can see how the code uses a collection to move folders. As mentioned in Chapter 24, it can cause problems if you move an item out of the Inbox (or any other folder) while the `For Each...Next` loop is still looping through the folder. Instead, you should keep track of which items are to be moved, and the `Collection` object is ideal for this purpose. Then, after the `For Each...Next` loop has completed, you can move the items by going through the collection.

Some Possible Changes

As written, the function moves any message in which the message subject contains the specified text. This is done using the `Instr()` function, which compares two strings:

```
Instr(String1, String2)
```

If `String2` is found anywhere within `String1`, the function returns a value greater than 0 (in fact, it returns the position at which `String2` is found). Otherwise it returns 0. You could also move messages only if the message subject exactly matches the specified text by changing that line of code to:

```
If StrComp(m.Subject, Subject, vbTextCompare) = 0
```

The `StrComp` function compares two strings and returns:

- 0 if the two strings are the same.
- –1 if the first string is less than (before alphabetically) the second string.
- 1 if the first string is more than (after alphabetically) the second string.

The `vbTextCompare` argument tells `StrComp()` to ignore the case of letters. Other options are explained in the VBA documentation.

There are lots of other criteria you can use to move or process messages, such as receipt date, sender name, whether the message has been read, and so on. Table 24.3 described the various message properties that may be useful when processing messages.

Using the Application

There's one more element needed to complete this application. You cannot run `MoveMessagesBySubject()` directly. You need a macro that can be run from the Macros dialog box and also lets the user enter the required information — subject text to search for and destination folder name. This is accomplished by the macro `MoveFolder()`, shown in Listing 25.2.

LISTING 25.2

The MoveMessages () Macro

```
Public Sub MoveMessages()

Dim Subject As String, DestinationFolder As String
Dim result As Boolean

Do
   Subject = InputBox("Enter the subject text to look for", _
     "Move Folders By Subject")
Loop Until Len(Subject) > 0

Do
    DestinationFolder = InputBox("Enter the name of the destination folder", _
      "Move Folders By Subject")
Loop Until Len(DestinationFolder) > 0

result = MoveMessagesBySubject(Subject, DestinationFolder)

If result Then
    MsgBox "Messages moved successfully"
Else
    MsgBox "An unknown error occurred"
End If

End Sub
```

Why a Macro and Not a Procedure?

Why do I call this a macro and not a procedure? It is technically a procedure, but there are three factors, mentioned earlier in Chapter 24, that make it a macro (that is, it will be listed in the Macros dialog box):

- It is a `Sub` and not a Function.
- It takes no arguments.
- It is not marked with the `Private` keyword.

This macro uses the `InputBox` statement to prompt the user for the text to search for and the name of the destination folder. Note that the two `InputBox` statements are enclosed in `Do...Until` loops. This is for data validation purposes—to guard against the possibility that the user accidentally enters a blank string. The `Len()` function returns the length of a string (number of characters it contains), and the loops continue prompting the user until a non-empty string is entered.

Adding the Code to Your Outlook Project

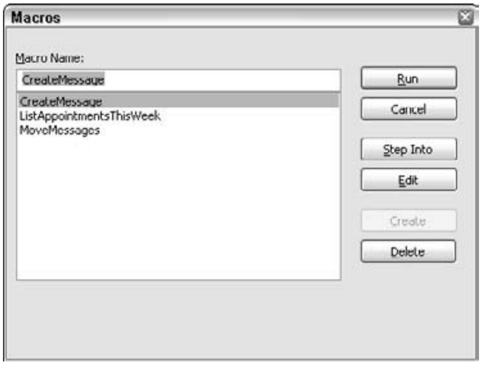
The steps required to add this code to your Outlook installation are simple:

1. In Outlook, press Alt+F11 to open the VBA Editor.
2. In the Project Explorer, double-click Module1 to open it.
3. If there is any code in the module, move the editing cursor to the end of the module.
4. Copy the code for the macro `MoveMessages()` and the procedures `FindFolder()` and `MoveMessagesBySubject()` and paste them into the module.
5. Click the Save button on the VBA Editor's toolbar.

After you perform these steps, the macro `MoveMessages` will be listed in the Macros dialog box from where you can run it (see Figure 25.1).

FIGURE 25.1

The macro MoveMessages is listed in the Macros dialog box.



Creating a Summary of Upcoming Appointments

The demonstration that is presented here serves two purposes. First, it presents a useful example of using VBA to work with your calendar items. Second, it shows how to work with Outlook Notes programmatically. In addition, it shows you some of the things you can do with dates in VBA.

This application is a macro — that is, it is a `Sub` procedure with no arguments. I have named it `ListAppointmentsThisWeek`. Its operation proceeds as follows:

1. Get a reference to the default Calendar folder (as was described in Chapter 24).
2. Create a date that is one week from the present.
3. Create the note heading (the first line of the note) that consists of the text `Week of` followed by today's date. You'll recall from Chapter 13 that the first line of a note is automatically used as its subject.
4. Loop through all appointments in the folder using a `For Each...Next` loop.
5. Examine each appointment's start date — it must be greater than or equal to today's date and less than or equal to the date you created one week hence.
6. If the appointment meets these criteria, extract the required information from it.
7. When all appointments have been processed, create and display the note.

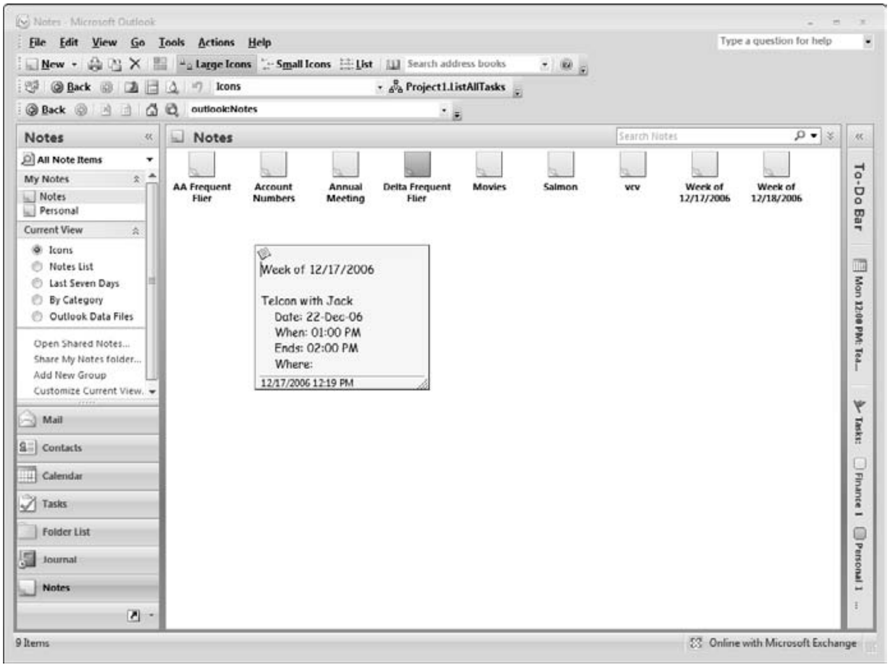
The technique used here to compile all the information from all matching appointments is to create a string variable and add each additional bit of information to the end of the string. Note the use of the constant `vbCrLf`, which is the newline character — it moves everything that follows to the next line.

Be aware that this macro will find appointments only in the default Calendar folder. If you have created additional calendar folders, and want the macro to look in them, you will have to modify the code to get a reference to these additional folders and process the appointments they contain as well. You saw how to get a reference to a user-created folder in Chapter 24.

Figure 25.2 shows a note created by this macro. The code for the macro is presented in Listing 25.3.

FIGURE 25.2

The macro ListAppointmentsThisWeek creates a note containing all your appointments for the next week.



LISTING 25.3

The ListAppointmentsThisWeek Macro

```
Public Sub ListAppointmentsThisWeek()

' Creates a Note containing a list of all appointments
' for the coming week.

Dim MyCalendar As Outlook.MAPIFolder
Dim MyAppt As Outlook.AppointmentItem
```

continued

LISTING 25.3 *(continued)*

```
Dim MyOutlookNS As Outlook.NameSpace
Dim temp As String
Dim OneWeekHence As Date
Dim doc As Outlook.NoteItem

' Get a reference to the calendar folder.
Set MyOutlookNS = GetNamespace("MAPI")
Set MyCalendar = MyOutlookNS.GetDefaultFolder(olFolderCalendar)

' Create a date a week from now.
OneWeekHence = DateAdd("d", 7, Date)

' Create the Note heading
temp = "Week of " & Date & vbCrLf & vbCrLf

' Loop for each appointment in the folder.
For Each MyAppt In MyCalendar.Items
    ' Find appointments within the next week.
    If MyAppt.Start >= Date And _
            MyAppt.Start <= OneWeekHence Then
        ' The info is put together in temp.
        temp = temp & MyAppt.Subject & vbCrLf
        temp = temp & "    Date: " & _
            Format(MyAppt.Start, "Medium Date") & vbCrLf
        temp = temp & "    When: " & Format(MyAppt.Start, "Medium Time") _
            & vbCrLf
        temp = temp & "    Ends: " & Format(MyAppt.End, "Medium Time") _
            & vbCrLf
        temp = temp & "    Where: " & MyAppt.Location & vbCrLf & vbCrLf

    End If
Next
        ' Create a new note.
        Set doc = CreateItem(olNoteItem)
        ' Add the compiled text to the Note.
        doc.Body = temp
        ' Display the note.
        doc.Display

End Sub
```

Summary

Macros and VBA programming let you automate commonly performed tasks in Outlook. Although it takes some time and effort to create the macros, you'll often find that this investment is generously repaid in saved time and reduced errors. This chapter presented two real-world examples of VBA code that performs useful, real-world tasks. These applications can serve as the basis for your own projects.

Chapter 26

Working with Outlook Forms

IN THIS CHAPTER

Almost everything you do in Outlook is based on a form. When you create or read an email message, you use a message form. When you read an appointment, you use an appointment form. The same goes for contacts, journal entries, and tasks. Outlook provides you with all these predefined forms, but you do not have to limit yourself to these — you can create your own custom forms and publish them for others to use. This chapter takes you through the basics of creating and using forms in Outlook. The next chapter goes beyond the basics to cover more advanced form topics.

Understanding Outlook Forms

An *Outlook form* provides a way to collect and distribute information. In addition to all the standard things you can do with forms in Outlook, such as creating email messages, you can use custom forms for tasks such as posting information to public folders, gathering requests from meeting attendees, and the like. The term *form application* is sometimes used for a collection of one or more Outlook forms designed to serve a particular purpose.

Custom forms in Outlook are based on existing form templates. All Outlook installations include the basic set of templates that correspond to the forms that Outlook itself uses. These are

- Appointment
- Contact
- Journal Entry
- Message
- Task

Forms and Microsoft Exchange

Though not strictly required, it is true that almost all Outlook forms applications use Microsoft Exchange for public folders. This is covered in Chapter 28.

There are some other form templates that may require some explanation:

- **Post:** This form is intended for collecting information for posting to a public folder.
- **RSS Article (hidden):** This form is designed for use with RSS feeds.
- **Meeting Request (hidden):** This form is used to send a meeting request.
- **Task Request (hidden):** This form is used to send a task request.

Note that three of these forms are marked as hidden. This is because during normal Outlook operation you never see these forms — they are used behind the scenes. They are still available for use as a template, however.

When you decide which template to base your custom form on, think about the purpose of the application. If the functionality requires sending information between recipients, the Message form is likely your best bet. If the functionality requires posting information to public or private folders, a Contact, Appointment, Task, or Post template would be suitable depending on the nature of the information.

In practice, two of Outlook's forms are used most often as templates: Message and Post. This chapter focuses on using these form templates, but the principles are the same for the other templates.

Creating a custom form involves two fundamental steps:

1. Design the form to work with the information required by your application.
2. Publish the form to make it available.

These topics are covered in the remainder of this chapter and in the next chapter.

Designing a Form

You create custom forms in the *Forms Designer*, a powerful tool that lets you customize a form to precisely meet your needs. This section explains the procedures you use in the Forms Designer, then later in the chapter I present some step-by-step examples of creating custom forms.

In Outlook, a *field* represents a single piece of information, such as the subject of an email message or the phone number of a contact. Forms use fields, too — in fact, all the information a form

Different Types of Custom Forms

Outlook supports three categories of custom forms. The most basic, called simply *Outlook Forms*, are the most widely used because they are compatible with other versions of Outlook and provide all the power and flexibility that most people require. The other two types are *Outlook Form Regions* and *InfoPath Forms*, which are more advanced and are beyond the scope of this book.

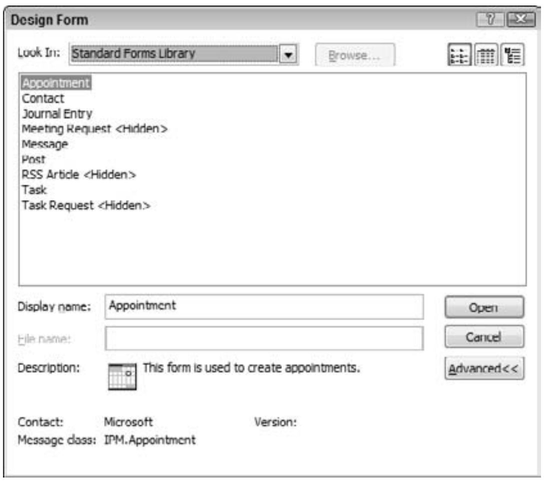
contains is represented by fields. Each form template starts with a set of default fields. When you design the form, you can add additional fields from Outlook's list of predefined fields, and you can also create you own custom fields.

Starting a New Form

To open the Forms Designer and create a new custom form, select Forms from the Tools menu and then select Design a Form. The Design Form dialog box, shown in Figure 26.1, lets you select the form that your custom form will be based on (as explained earlier in this chapter). By default, this dialog box displays the form templates in the Standard Forms Library. This section uses the Message template for illustration purposes, but the procedures and principles are the same for other form templates.

FIGURE 26.1

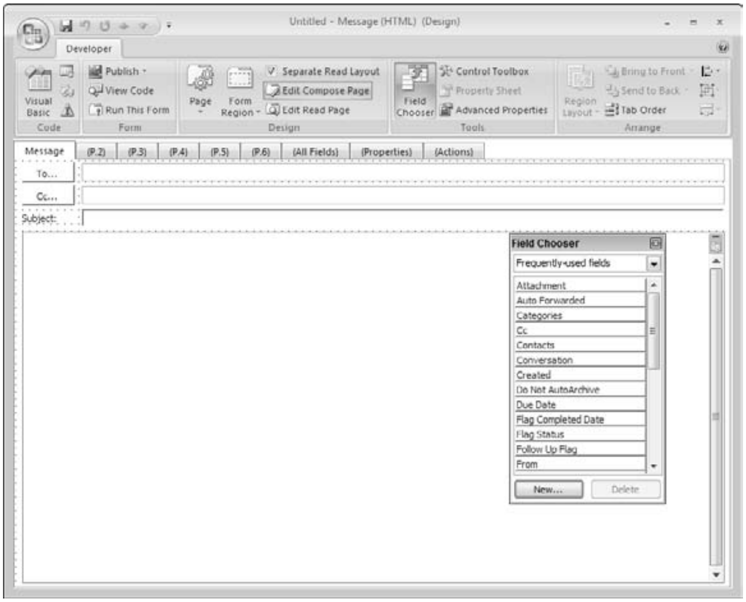
Selecting the template for a custom form.



After selecting the desired template and clicking OK, the template opens in the Forms Designer as shown in Figure 26.2.

FIGURE 26.2

The selected template — in this case, the Message template — is ready for editing.



When you first look at the form in the Forms Designer, it may look like the form it is based on — in this case, the Message form. You see the To and CC and Subject fields and a large field to enter the message body. But a moment's observation will reveal that it is very different:

- The ribbon, named the *Developer ribbon*, displays an assortment of tools you use in designing your form. It is not the usual ribbon that you see displayed on the Message form.
- The Field Chooser lists the various fields available for the form.
- The form itself has nine tabs, some of which have meaningless names such as P.2 and P.3.
- The background of the form — although perhaps not clearly visible in the figure — displays a grid of dots.

These factors show you that the form is in design mode, ready to be modified as needed.

Using Other Form Templates

You are not limited to using the form templates in the Standard Forms Library. There may be other templates available, installed by your IT department, and you can also use custom forms that you have designed previously as a template.

Can't Edit a Page?

Some form templates have one or more of their pages locked, which means you cannot edit them. For example, the Task page in the Task template is locked. Creating a custom form based on one of these templates means working with the other pages in the template.

Modifying a Form

If you want to modify a form that you designed previously:

1. Open the Design Form dialog box (shown earlier in Figure 26.1).
2. Open the Look In list at the top of the dialog box and select the folder where you originally published the form.
3. Select the form from the list.
4. Click Open.

You can now use the techniques explained in this chapter to modify the form and publish it.

Form Structure

A form is made up of one or more tabs, called *pages* in Outlook. If you refer back to the Message form template in Figure 26.2, you can see that it has nine pages. Some pages are defined as part of the template — for example, the Message, All Fields, Properties, and Actions tabs in this example. Others — P.2, P.3, and so on — are blank to start with so that you can design them exactly as you see fit. You do not have to use all the available pages. A custom form has at least one visible page, of course, and as many more as the application requires. In the Forms Designer, pages whose name is displayed in parentheses are be displayed when the form is used.

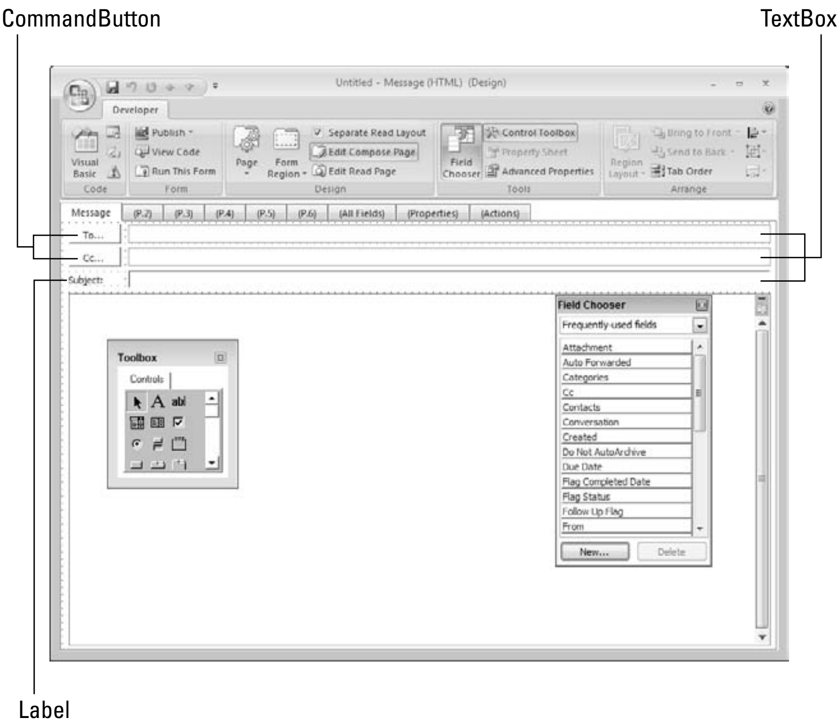
Each tab can be thought of as a page on which you place elements or controls. The Forms Designer has a set of controls to perform specific tasks. Look at Figure 26.3, which shows part of the Message template with the controls called out. There are three types of controls on this form:

- **Textbox:** For user entry and editing of text.
- **Label:** For displaying text that the user cannot edit.
- **CommandButton:** For carrying out an action when the user clicks it.

A form usually has actions associated with it as well. Actions are defined in *VBScript*, a lightweight version of the VBA programming language that can be included with a form. VBScript is usually associated with a `CommandButton` control because that is the control designed for the user to click to perform some action.

FIGURE 26.3

Each tab on a form contains controls, three of which are identified here.



In a nutshell, designing a custom form consists of arranging controls on the pages of the form. The controls are selected and arranged to accommodate the information the form is designed to work with. A form also has actions defined in VBScript.

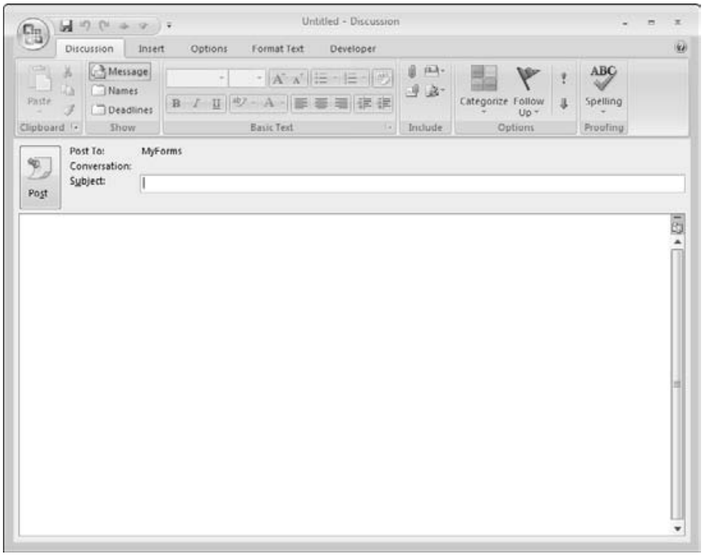
Working with Pages

Every form template has a certain number of built-in pages. You cannot add pages to or delete pages from a form, but you can control which ones are shown when the form is used. Pages whose names are in parentheses are not displayed. To specify that a page should be displayed when the form is run, or to change a page name, click the page's tab, click the Page button on the ribbon, and select either Display This Page or Rename This Page from the menu.

When a form is run, the pages you specified to be displayed will be listed in the Show section of the ribbon. For example, in Figure 26.4 you can see the Show section for a form that has three pages named Message, Names, and Deadlines. The user clicks the name of the page she wants to view.

FIGURE 26.4

When a form is run, the user selects from the available form pages in the Show section of the ribbon.



Page Properties

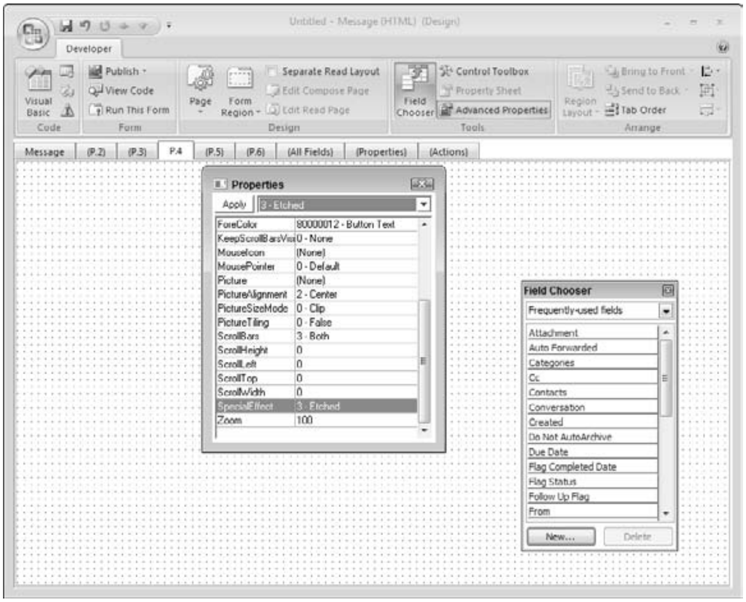
Each page of a form has a set of properties. To display the Properties dialog box for a page (shown in Figure 26.5), select the page by clicking its tab (make sure that no control on the page is selected). Then, click the Advanced Properties button in the Tools section of the ribbon.

To set a property, click its name in the list and select the desired value from the list at the top of the dialog box. For some properties, a small button with ... on it is displayed at the top right of the dialog box — click this button to open a dialog box where you set the property.

Click the Apply button to apply new property settings to the page without closing the dialog box. To close the Properties dialog box, click the Advanced Properties button again or click the close button (the red X at the top right of the dialog box).

FIGURE 26.5

Displaying the Properties dialog box for a page.



Adding Fields to a Form

As has already been mentioned, a form uses fields to hold its data. A form template contains its own default set of fields; you can add more fields to a form and delete some of the default ones until the new custom form contains just the fields you need.

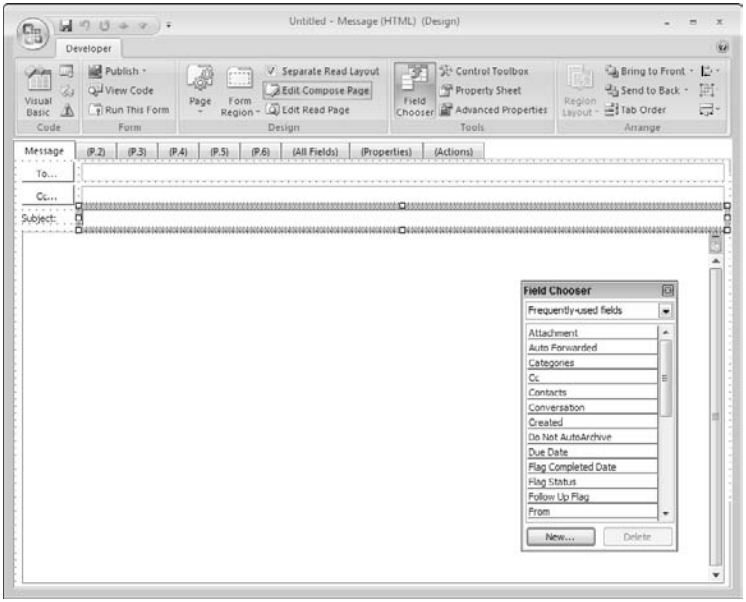
Every field on a form is represented by a control. The type of control is appropriate for the data the field contains. By adding a field to a form you are automatically adding the corresponding control. This is the easiest and recommended way to add controls to a form, although it is not appropriate in all situations.

You add fields to a form using the Field Chooser. This is usually displayed by default when you create a new form, but if necessary click the Field Chooser button in the Tools section of the ribbon to display it. The Field Chooser is shown in Figure 26.6.

At the top of the Field Chooser is a pull-down list where you select the category of fields to be displayed in the Chooser. The default is Frequently Used Fields. To add a field to the form, drag it from the Field Chooser and drop it at the desired location on the page (although you can change the position later).

FIGURE 26.6

You use the Field Chooser to add fields to a form.



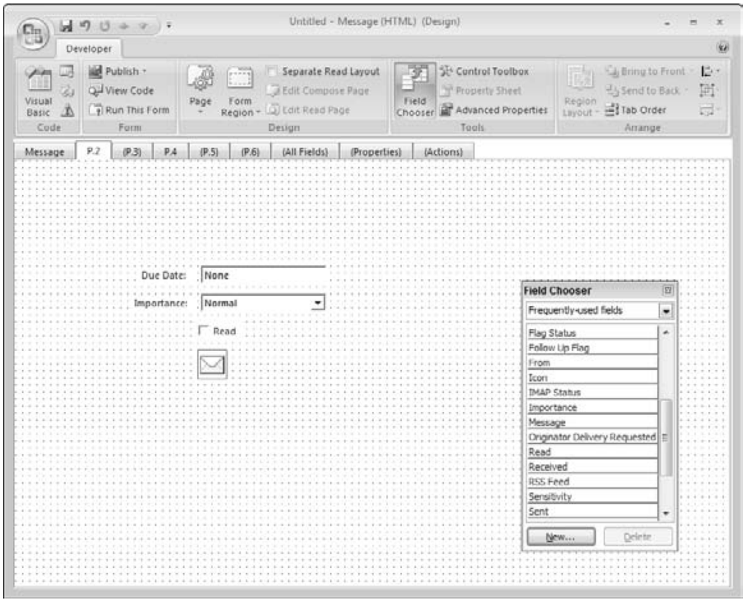
To illustrate, look at Figure 26.7. To create this example, four fields were dragged from the Field Chooser to the form. From top to bottom they are

- **Due Date:** The Forms Designer has created a TextBox control to hold the date as well as an adjacent Label control to identify the field.
- **Importance:** This field can take three values: Low, Normal, and High. The Forms Designer has created a ComboBox control from which the user can select one of these values. Again, an adjacent Label serves to identify the field.
- **Read:** This field is a yes/no, true/false value, and the appropriate control is a CheckBox, which includes its own identifying label.
- **Icon:** The last control/field represents the icon associated with the form data — in this case a message (envelope) icon because the form is based on the Message template. The Image control, designed specifically for displaying digital images, is used here.

After you have added one or more fields to a page, you can work with them as described in the following sections — changing their size and position on the page, modifying their properties, and so on.

FIGURE 26.7

When you add a field to a page, the Forms Designer automatically adds the appropriate control(s).



Working with Controls

Controls are the foundation of form design. The Forms Designer provides you with a toolbox of 14 controls you can place on a form. Each control has a set of properties that determine its appearance and, in some cases, its behavior. A control that holds information is *linked*, or bound, to the corresponding form field. The techniques described in this chapter can be used to add new controls to a page or to modify or delete controls that are part of the template.

Adding Controls Manually

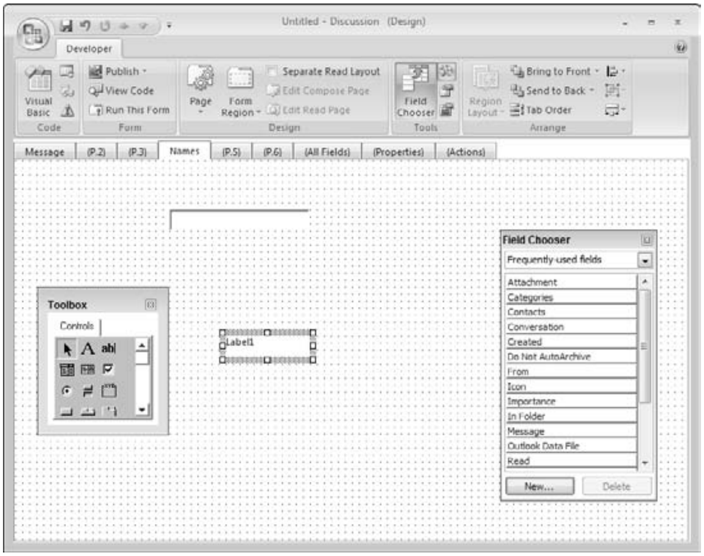
The usual way to add most controls to a page is by adding fields, as was described in the previous section. When you add a field, the Forms Designer automatically adds a control of the appropriate type to the page, saving you time and effort.

There are times, however, when you will want to add controls manually. For example, some forms use controls not linked to a field so you will have to use the manual method. You can also add a control manually and then later link it to a field.

You use the Toolbox to manually add controls to a page. The Toolbox, shown in Figure 26.8, is displayed or hidden by clicking the Control Toolbox button in the Tools section of the ribbon.

FIGURE 26.8

You manually add controls to a page from the Toolbox.



The arrow icon at the top left of the Toolbox is not a control—you select it when you want to manipulate controls already placed on a page. The other icons in the Toolbox represent the controls. In order across and then down, they represent:

- **Label:** Displays text that the user cannot edit. Usually used to identify other page elements.
- **TextBox:** Used for user entry/editing of text.
- **ComboBox:** Combines an editable text field with a list of items from which the user can select.
- **ListBox:** Displays a list of items from which the user can select.
- **CheckBox:** Represents an on/off option.
- **OptionButton:** Represents one in a set of two or more options. Within a set, one and only one option can be selected at a time.
- **ToggleButton:** Represents an on/off option.
- **Frame:** Used to group controls, for example to define a set of two or more OptionButtons.
- **CommandButton:** Used to carry out an action (defined in VBScript).

TabStrip and Multi-Page Controls

These controls are rarely used in Outlook forms because the multi-page structure of the form itself provides the same functionality. They are not covered further in this book.

- **TabStrip:** Used to display two or more tabs or pages.
- **MultiPage:** Similar to a TabStrip but easier to use.
- **ScrollBar:** Displays a vertical or horizontal scroll bar that the user can use to scroll with the mouse.
- **SpinButton:** Displays a pair of up/down arrows that the user can click to increment or decrement a numerical value.
- **Image:** Displays a digital image.

To add a control to a page manually, click the desired icon in the Toolbox and then drag on the page to place the control. Don't worry about the precise size or placement of the control — you can always change them later.

Selecting, Sizing, and Moving Controls

After placing one or more controls on a page, you can select an individual control by clicking it. A selected control displays a hatched border and small squares, called *handles,* on its corners and sides. In Figure 26.9, the upper TextBox is selected and the lower one is not.

Adding OptionButtons

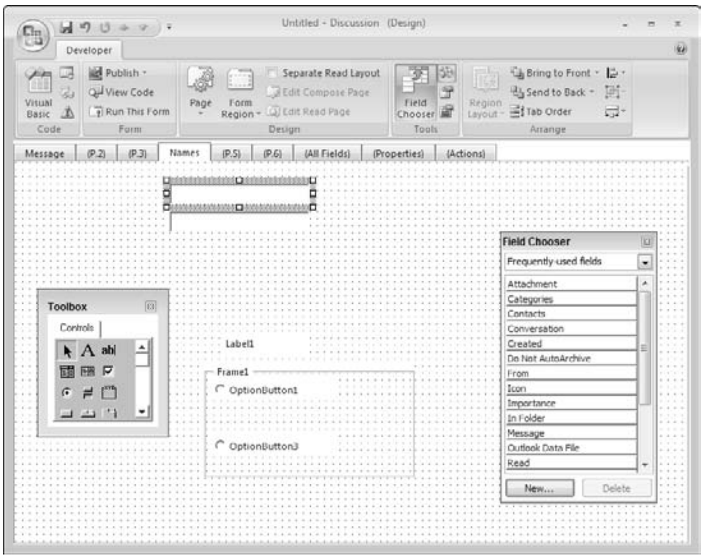
This is the only control that requires a special technique when adding it to a page. You must first place a Frame control on the page and then draw the individual OptionButton controls on the Frame. This is how a group of OptionButtons is defined, and within a group only one OptionButton can be selected at a time. When the user selects one, any other in the group that is selected is automatically turned off. You cannot define a group of OptionButtons by placing them on the page and then moving them onto a Frame — you must draw them directly on the Frame.

Control Names

Every control has a name that identifies it. The name must be unique on the page. When you add a control to a page, the Forms Designer assigns a default name that consists of the type of control followed by a number. Thus, adding two TextBox controls will result in the controls named `TextBox1` and `TextBox2`. You will often want to change the name of a control to describe its function. This is explained in the section on control properties later in this chapter.

FIGURE 26.9

A selected control displays a border and handles.



When a control is selected, you can perform the following actions with it:

- To move it, point at the border — the mouse cursor will change to a 4-headed arrow — and drag to the new location.
- To resize it, point at one of the handles — the mouse cursor will change to a two-headed arrow — and drag to the desired size.
- To delete it, press Del.

Aligning Controls

By default, all controls align to the grid of dots displayed on the page background. This alignment affects both the control position and size — in other words, the top-left corner is always at a grid boundary, and the height and width are always multiples of the grid size. This default behavior simplifies the task of creating neat-looking forms with controls that are aligned. You can modify this behavior if desired by clicking the Align button in the Arrange section of the ribbon and then selecting these commands from the menu:

- **Snap to Grid:** Turn this option off if you want to be able to position and size controls freely, without reference to the grid.
- **Show Grid:** Toggles the grid display on or off. Snap to Grid will still operate even when the grid is not displayed.
- **Set Grid Size:** Opens a dialog box where you can set the size of the grid (the default is 8). Changing the grid size does not affect controls already on the form.

Automatic Alignment and Sizing of Controls

The Forms Designer provides commands to automatically adjust the size and/or position of two or more controls to be the same. To use these commands you must first select two or more controls to adjust:

1. Click the first control to select it. This is the reference control whose size and/or position is applied to the other controls.
2. Hold down the Shift key while clicking the other control(s).

When you select two or more controls in this manner, you'll see that all selected controls display handles and a border, but the reference control has white handles while all other selected controls have black handles. This is shown in Figure 26.10.

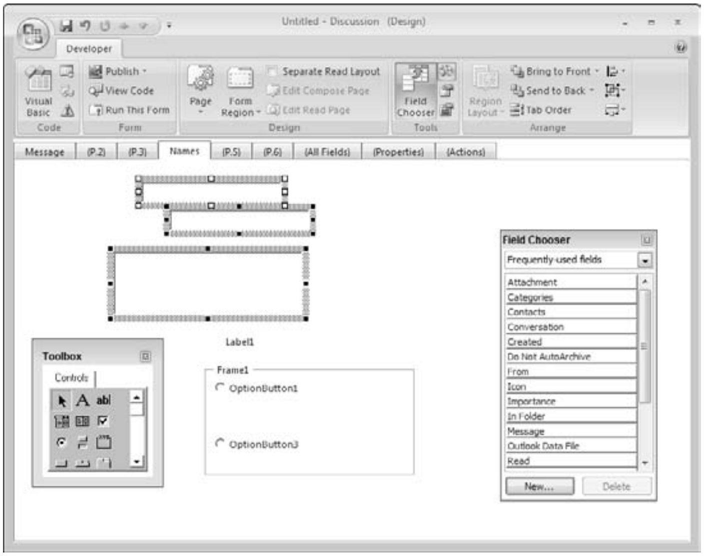
Once you have selected the controls, you size them by clicking the Size button on the ribbon, clicking the Make Same Size command, and then selecting Width, Height, or Both from the next menu.

To align the selected controls, click the Align button on the ribbon, then from the menu:

- Select Left, Middle, or Right to align the controls horizontally by their left edges, centers, or right edges.
- Select Top, Center, or Bottom to align the controls vertically by their top edges, centers, or bottom edges.

FIGURE 26.10

When multiple controls are selected, the reference control displays white handles.



Other Size and Position Tools

The Size and Align menus have a few additional commands that simplify the task of arranging controls on a page. On the Size menu:

- **Size to Fit:** Changes the size of the selected control(s) to fit between other controls on the page.
- **Size to Grid:** Changes the size of the control to match the closest grid points.

On the Align menu:

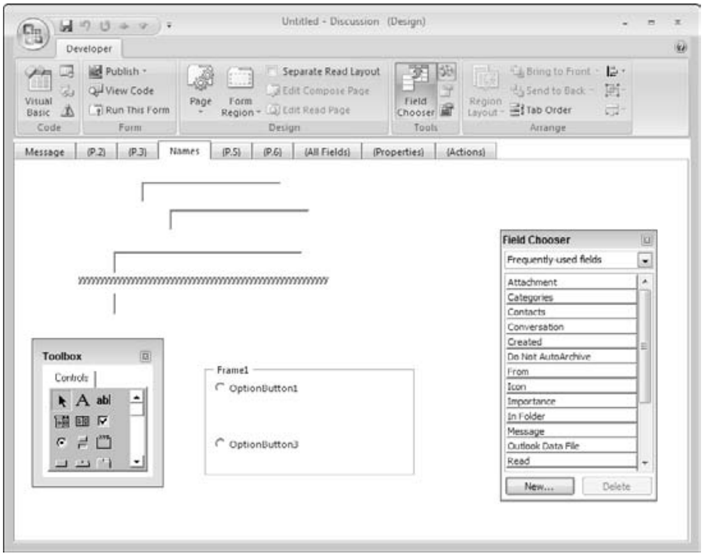
- **Distribute Horizontally:** Displays a submenu with commands for arranging selected controls horizontally.
- **Distribute Vertically:** Displays a submenu with commands for arranging selected controls vertically.
- **Center in Form:** Positions the selected control(s) either vertically or horizontally at the center of the form.
- **Arrange:** Displays a submenu with commands for arranging selected controls.

Working with the Z-Order

The Z-order of controls is relevant when one control overlaps another. You can think of it like overlapping sheets of paper on your desk — there's one on top, one on the bottom, and the ones in between in a certain order. With controls, this is the *Z-order*. For example, Figure 26.11 shows a label control that overlaps a TextBox control. You can see that the Label control hides the portion of the TextBox that is behind it — this means that the Label is at the front of the Z-order.

FIGURE 26.11

When controls overlap, the Z-order determines which one — the Label control in this figure — is on top.



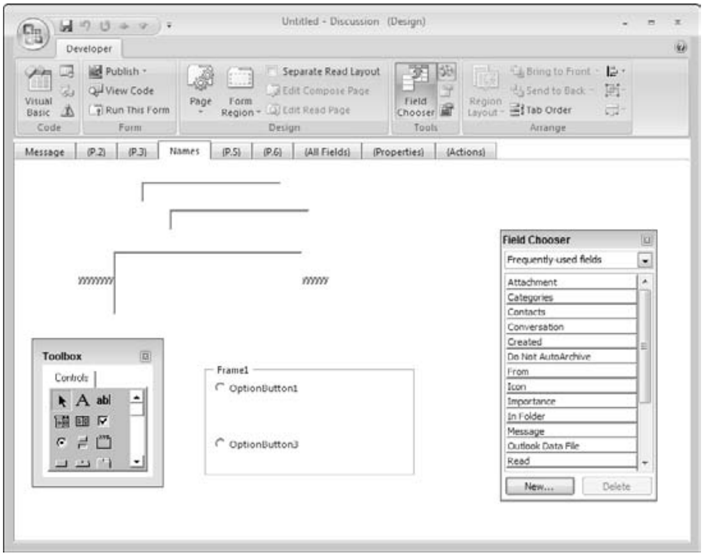
More Precise Z-Order Control

When there are more than two controls overlapping, you can precisely control their position in the Z-order rather than simply sending them to the front or back. Click the arrow next to the Bring to Front or Send to Back button on the ribbon and you'll see Bring Forward and Send Backward commands. These commands move the selected control one position in the indicated order. For example, if you had three overlapping controls, selecting the one at the top of the Z-order and using the Send Backward command would result in that control being at position 2 and the control that was at position 2 being at the top of the Z-order.

By selecting a control and clicking either the Bring to Front or the Send to Back button on the ribbon, you can change the position of the selected control in the Z-order. Figure 26.12 shows the same controls as in Figure 26.11 after either sending the Label control to the back or bringing the TextBox control to the front.

FIGURE 26.12

By changing the Z-order, you can modify which control is displayed on top.



Changing the Tab Order

When a form is being used, only one control is *active* — that is, has the focus — at a given time. The active control is indicated visually in some way. For example, when a TextBox is active it will display a blinking cursor.

The user can move the focus by clicking with the mouse or by pressing Tab or Shift+Tab to move the focus forward or backward in the tab order. Also, when the form is first opened, the control that is first in the tab order gets the focus.

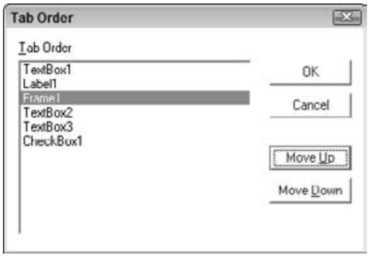
By default, controls are added to the tab order in the same sequence they are placed on the page (each page has its own tab order). To change the tab order, click the Tab Order button on the ribbon to open the Tab Order dialog box, shown in Figure 26.13. To change the order, click a control name and use the Move Up and Move Down buttons to change its position in the list.

Removing a Control from the Tab Order

If you do not want the user to be able to tab to a control, set its `TabStop` property to False (as explained later in this chapter in the control properties section).

FIGURE 26.13

Changing the tab order of the controls on a page.



The tab order on a form should reflect the logical structure of the form and how a user would normally move from control to control.

Working with Control Properties

As mentioned earlier, every control has a set of properties. Some properties are common to all or most controls, whereas others are relevant to only one or two controls. This section starts by describing the most important common properties and then discusses some individual controls in detail.

Control properties are accessible to the person designing the form. Some of them can also be changed in VBScript code while the form is running.

Accessing Control Properties

Each control's properties are divided, simply for convenience, into two groups. The more commonly used properties are grouped together on the control's property sheet, whereas the less frequently needed advanced properties have their own dialog box.

To view a control's property sheet, select the control and click the Property Sheet button in the Tools section of the ribbon. You can also right-click the control and select Properties from the context menu. Advanced properties are also accessed from the context menu by selecting the Advanced Properties command.

Common Control Properties

Some of the common control properties are found on the property sheet. The property sheet is essentially the same for most controls. It is shown, for a TextBox control, in Figure 26.14.

FIGURE 26.14

The property sheet provides access to the most often needed control properties.

The Display tab, shown in the figure, contains these properties. Note that some of these properties will not be available for some controls:

- **Name:** The control name, which must be unique on its page. You may want to change this from the default name to something more descriptive such as `FirstName` or `ZIPCode`, particularly if you will be manipulating the control in VBA code.
- **Caption:** The text of the control's caption, where applicable.
- **Font:** The font used for the control.
- **Foreground Color:** The color of the control's text.
- **Background Color:** The color of the control's background.
- **Visible:** If selected, the control will be visible when the form runs.
- **Enabled:** If selected, the control will be enabled (can be accessed by the user) when the form runs.
- **Read Only:** If selected, the data in the control cannot be changed by the user.
- **Sunken:** If selected, the control displays with a 3-D sunken appearance.
- **Multi-line:** If selected, the control can display multiple lines of text. Applicable to TextBox controls only.

The Foreground Color and Background Color properties let you choose from a set of predefined Windows operating system colors. For more choices you must use the `BackColor` and `ForeColor` properties in the Advanced Properties dialog box.

The Layout tab of the property sheet is shown in Figure 26.15. The `Top`, `Left`, `Height`, and `Width` properties specify the size and position of the control. You can change these here, but usually size and position of controls is modified in the designer.

The Resize with Form option determines whether the control always keeps its set size (option off) or grows and shrinks with the form.

FIGURE 26.15

The Layout tab of the property sheet.

The Validation tab is used to define data validation rules for a control/field and is covered in the next chapter.

A control's advanced properties are listed alphabetically in the Properties dialog box as shown in Figure 26.16. The property names are in the left column and the values are in the right column. The properties listed here duplicate some of the properties found in the property sheet, and you can change them in either place. Other properties listed here can only be accessed via the Advanced Properties command.

FIGURE 26.16

The advanced properties for a control are listed in the Properties dialog box.

Some of the advanced properties that you are most likely to need to change are described here. To change a property, click its name in the list and then select a value at the top of the dialog box:

- **BackColor, ForeColor:** Same as Background Color and Foreground Color in the property sheet, but provide a greater selection of colors to choose from.
- **BackStyle:** Sets the control background to Opaque or Transparent.
- **BorderStyle:** Sets the style of the control's border to Single or None.
- **Locked:** If True, the control is read-only.
- **MousePointer:** Specifies the shape of the mouse pointer when it is over the control.
- **TabStop:** If True (the default), the control is part of the tab order. Set to False if you do not want the user to be able to tab to the control.

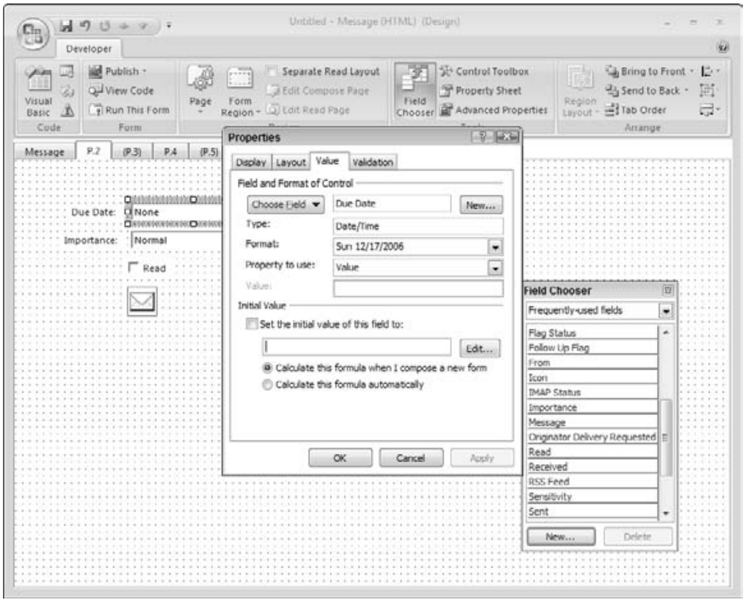
The Value Properties

The Value tab of the property sheet is related to the field that the control corresponds to. This tab is shown in Figure 26.17. If the control is already associated with a field, the property values will be filled in (as in the figure). Otherwise they will be blank.

WARNING **To associate a control with a field, or to change its association to a different field, click the Choose Field button and follow the prompts to select a field. Be careful doing this because not all control types are appropriate for certain field data types — although the Forms Designer will let you make inappropriate associations, the resulting form is likely to be less useful.**

FIGURE 26.17

The Value tab of a control's property sheet specifies the field the control represents.



The other properties are

- **Type:** Displays the data type of the field. This is a read-only property — you cannot change it because the data type is a characteristic of the field.
- **Format:** Depending on the data type, you can select the format it should be displayed in.
- **Property to Use:** Specifies the control property linked to the field. This is almost always the `Value` property and generally should not be changed unless you have a good reason to.

Testing a Form

While you are designing a form, you can test, or run, the form to see how it works. To do so, click the Run This Form button on the ribbon. The form opens and you can use it just as if you were using it "for real." You can test your tab orders, make sure controls display as desired, check default data values, and so on. If it's a form that can be sent, you can send it (which closes the form as well). If it's a form to be posted, you can post it. Otherwise, after testing close the form and return to the Forms Designer by clicking the X at the top right of the form.

Publishing a Form

You must publish a form to make it available for use. You have three options:

- Publish the form to the Personal Forms Library, where it will be available for use as a template.
- Publish the form to a personal folder, where it will be available for your use only.
- Publish the form to a public folder (Microsoft Exchange only), where it will be available for use by anyone who has permission to access that folder.

The true power of Outlook forms can only be realized when you are using them with an Exchange Server account. This topic, including publishing forms to public folders, is covered in Chapter 28. For now I will explain the fundamentals of publishing a form.

After you have completed form design, click the Publish button on the ribbon. The Forms Designer displays a menu with two choices: Publish Form and Publish Form As.

If your form was created based on one of Outlook's default templates, these commands are equivalent — either command opens the Publish Form As dialog box (see Figure 26.18). Then:

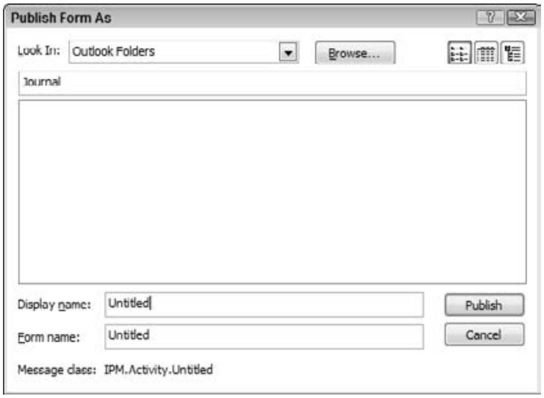
1. Open the Look In list and select the folder where you want to publish the form. If the folder you want is not on this list, click the Browse button to locate it.
2. Enter a descriptive name for the form in the Display Name box. This is the name Outlook uses for the form.
3. By default, the Form Name box — which is the name that the form's file will be given — is the same as the display name. There is rarely a reason to change this but you can if needed.
4. Click Publish.

Creating Folders for Forms

In most situations you will publish a form to a folder created specifically for that form (or for two or more forms of the same type). When you create such a folder, you will specify the type of item it will contain. Be sure to specify the same type of item as the template your form is based on.

FIGURE 26.18

Selecting a folder and name for a published form.



Summary

Outlook forms provide a powerful tool for creating custom solutions, or applications, that require the collection and/or distribution of data. You can create a custom form based on any of Outlook's built-in forms, adding controls and fields to perfectly suit your application's needs. This chapter covered the fundamentals of designing and publishing custom forms. In the next chapter, you learn some more advanced aspects of Outlook forms.

Chapter 27

Going Beyond Basic Forms

In the previous chapter, you learned the fundamentals of designing and publishing custom Outlook forms. This chapter goes beyond the basics to cover some more advanced aspect of custom form design.

IN THIS CHAPTER

- Understanding custom fields
- Working with Read and Compose modes
- Creating shared, combination, and formula fields
- Validating user input
- Using form properties
- Understanding form actions
- Including VBScript in your forms

Using Custom Fields

Given the wide array of form fields provided by Outlook, you might think you would never need a custom field. This would be a mistake — it is fairly common for a form design to require one or more custom fields to meet the needs of the application. This section shows you how to define custom fields and add them to a page on a form.

Planning a Custom Field

Once you have determined that none of Outlook's built-in fields are appropriate for your data, your next step is to do a little planning. Two factors come into play:

- Is the custom field a good match for the type of data it will contain?
- Does the custom field provide flexibility for further changes to the form?

For example, suppose you are designing a form for employee data, and one of the pieces of information is gender. There are only two mutually exclusive choices, Male and Female, and the list of choices will never expand, so using an OptionButton control — two of them to be precise — makes sense.

But suppose another piece of information is health plan — which of the three company health plans is the employee enrolled in? Again you have mutually exclusive choices, so why not use OptionButtons again? But you cannot be guaranteed that your company will always offer only three health plans. Suppose they expand the offering to eight plans — modifying the form to include eight OptionButton controls would be a hassle, not to mention that the form's visual appearance would suffer. Better in cases like this to use a ComboBox, which offers an easily expandable list of mutually exclusive choices.

Creating a Custom Field

Once you have decided how to implement your custom field, there are two ways to go about it. The end result is the same, but one technique gives you more flexibility in selecting the control type that will be used.

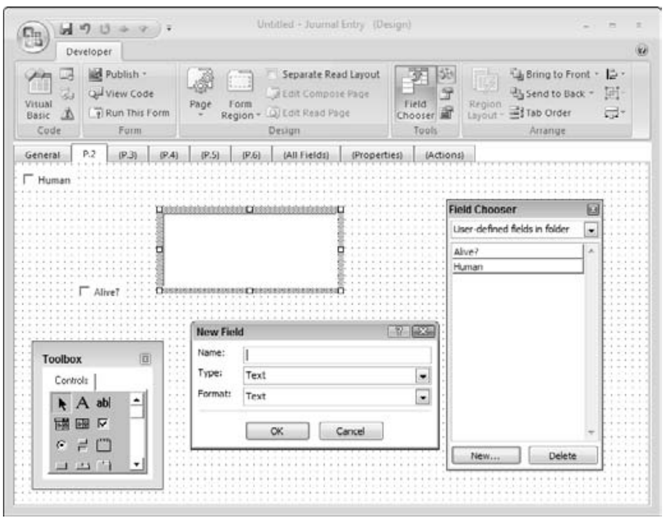
Using the Field Chooser to Define a New Field

The Field Chooser has a New button that you click to define a new field. It brings up the New Field dialog box, shown in Figure 27.1. Enter information about the field as follows:

- **Name:** The name of the field.
- **Type:** The data type of the field (text, number, date, yes/no, and so on).
- **Format:** Select the display format for the field.

FIGURE 27.1

Defining a custom field for a form.



Some types of fields do not offer formatting options. For example, if the data type is Text there are no formatting choices, but if the type is Number you can select format options such as the number of decimal places displayed.

After you click OK to close the New Field dialog box, the new field appears in the User-Defined Fields section of the Field Chooser. From here you can drag the field onto a form page just like with the built-in fields.

Adding a Control First

The other way to define a new field involves adding the control to the page first and then creating the field for it:

1. If necessary, display the Toolbox.
2. Click the desired control icon in the Toolbox.
3. Draw the control at the desired location on the page.
4. With the control selected, click the Property Sheet button on the ribbon to open the control's property sheet.
5. In the property sheet, click the Value tab (see Figure 27.2). If this tab is not available, it means that you have selected a type of control that cannot be associated with a field. Delete the control and choose another one.
6. Click the New button to display the New Field dialog box (shown earlier in Figure 27.1).
7. In the New Field dialog box, enter the new field name and select its data type and format.
8. Click OK to return to the property sheet. The details of the new field are now displayed on the Value tab (see Figure 27.3).
9. Click OK to close the property sheet.

FIGURE 27.2

Before associating a new field with a control, the Value tab is blank.

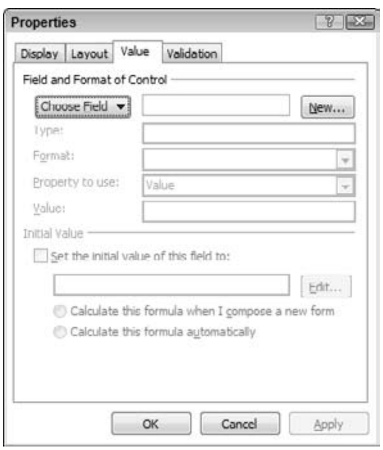
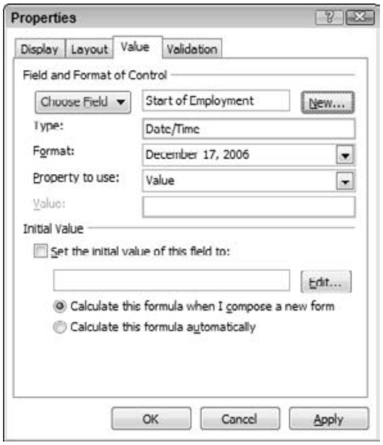


FIGURE 27.3

After associating a new field with a control, the Value tab displays the field details.



Using Read and Compose Modes

For certain types of forms, the person who composes the form (when using it, not designing it) has different needs from the person who receives and reads the form. Email messages are a perfect example.

- The person who composes the message needs to have To and CC fields that can be edited.
- The person who receives the message needs to have To and CC fields, but they need not be editable. The reader also needs a From field and a Sent field.

To handle situations such as this, Outlook forms — at least some of them — can have two display modes: Read and Compose. This is illustrated in Figures 27.4 and 27.5, which show a message form in the Forms Designer in Compose and in Read modes, respectively.

FIGURE 27.4

In Compose mode, a message form displays editable To, CC, and Subject fields.

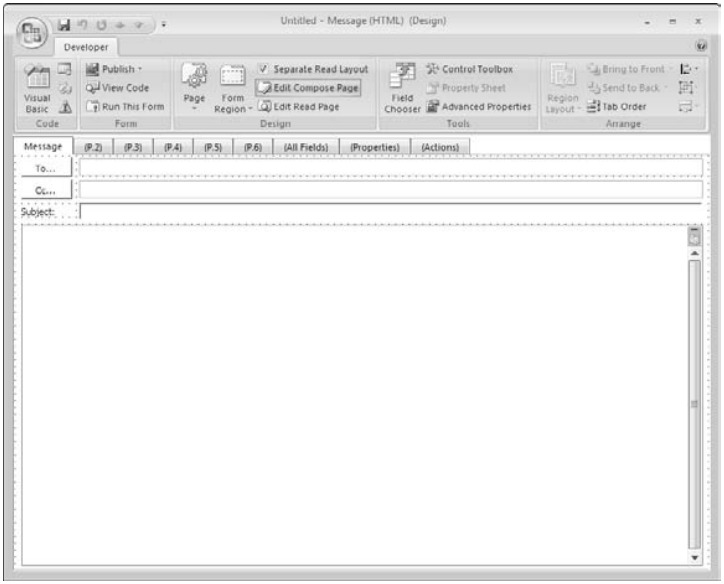
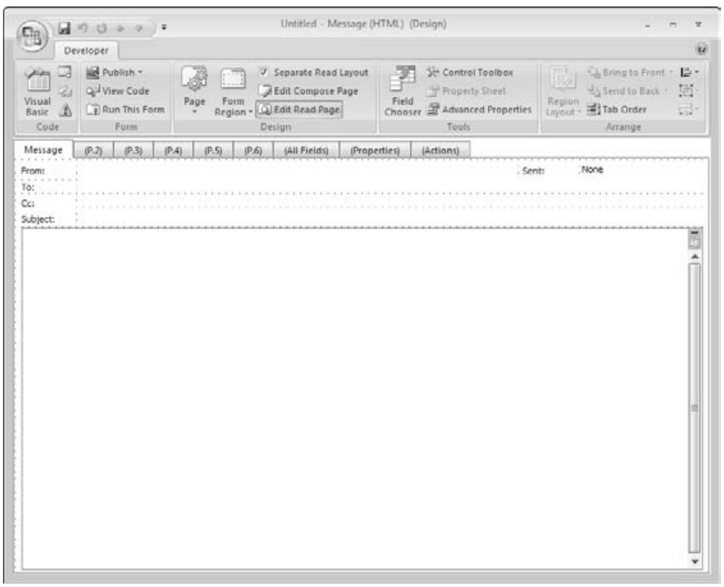


FIGURE 27.5

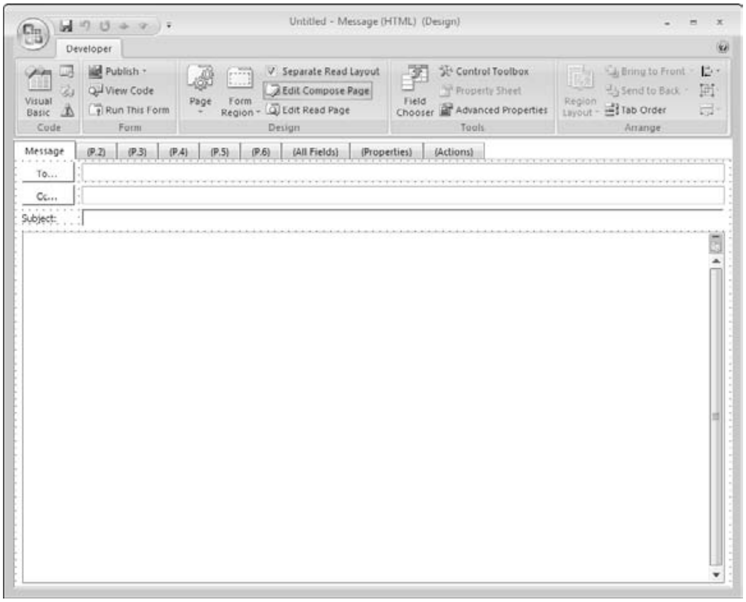
In Read mode, a message form's To, CC, and Subject fields are not editable, and there are also From and Sent fields displayed.



Some form templates do not support Read and Compose modes. In this situation, the Separate Read Layout option is available in the Design section of the ribbon (see Figure 27.6). Turn this option on if you want separate Read and Compose modes for a particular form page, or turn it off if you do not. If the option is selected, you use the adjacent Edit Compose Page and Edit Read Page buttons to switch the Forms Designer between modes.

FIGURE 27.6

You choose Read/Compose mode options on the ribbon.



Working with Fields

This section covers some of the details and options that are applicable to working with fields on an Outlook form.

Shared Fields

A *shared field* is one present on both the Compose and Read views of a page (Compose and Read modes were explained earlier in this chapter). A shared field is linked to two controls, one on the Read view of a page and the other on the Compose view. The two controls can have different properties. For example, in the Compose view you might use a TextBox with the Enabled property set to True so the user can edit the data, whereas in the Read view you use a TextBox with Enabled set

to False so the data is not editable. You can even have two different types of controls linked to the same field, for example a TextBox on the Compose view and a Label on the Read view.

To create a shared field, you can simply drag the field from the Field Chooser to the Read view and then switch to the Compose page and drag it there. This works only if you want the same type of control in both locations. You can edit each control's properties independently as needed.

If you want different types of controls on the Read and Compose pages:

1. Display the Compose page.
2. Using the Toolbox, add the desired kind of control to the page.
3. Use the Value tab in the control's property sheet to associate the control with the field.
4. Display the Read page and repeat steps 2 and 3.

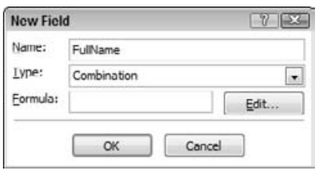
Creating Combination Fields

A *combination field* is one that combines data from two or more fields and treats it as a unit. For example, if your form has FirstName, MiddleName, and LastName fields you can create a combination field for full name.

To create a combination field, display the Field Chooser and click the New button to open the New Field dialog box. Enter a name for the custom field and select Combination in the Type list. You can see that the dialog box now displays a Formula field and an Edit button (see Figure 27.7).

FIGURE 27.7

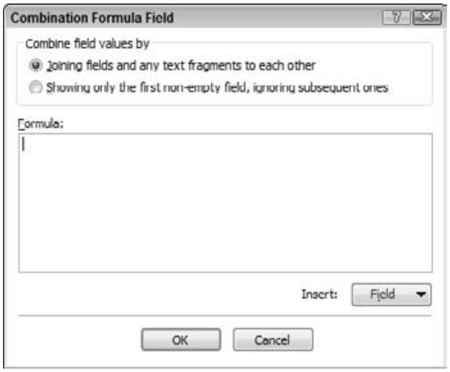
Defining a combination field.



To define the field, click the Edit button to open the Combination Formula Field dialog box, shown in Figure 27.8. For most combinations fields, you want to select the Joining Fields... option at the top, which works by combining two or more fields into a single data item. The second option, Showing Only..., is used when you want the custom combination field to display data from the first non-empty field in a list you specify.

FIGURE 27.8

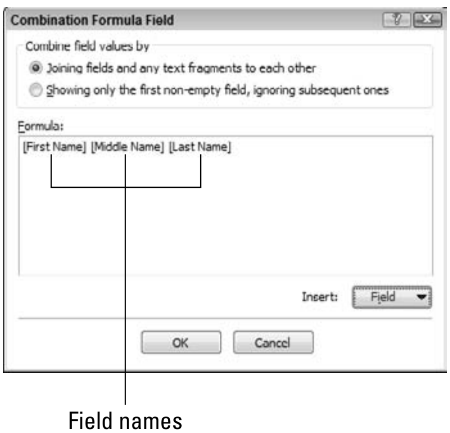
Creating the formula for a combination field.



To define the formula for the combination field, click the Field button. You can choose from all available fields including user-defined ones. Repeat this action to select all of the fields that you want combined in the combination field, in the desired order. Each field is added to the formula as a field name enclosed in brackets, with a space between fields, as shown in Figure 27.9. If you want to add punctuation or other elements, add it as needed between the field names.

FIGURE 27.9

A combination field formula displays the source field names in brackets.



When the formula is complete, click OK to return to the New Field dialog box, which now displays the formula in the Formula box. Click OK to close the New Field dialog box and the new combination field is available, as a user-defined field, in the Field Chooser. You use it on your forms like any other field.

Using Formula Fields

A *formula field* displays the result of a calculation using data in other fields. This kind of field is usually used to work with numbers, but it can also perform operations on text data that are more complex than simply combining fields as with a combination field. For example, suppose you are designing an order form that already has fields for OrderTotal and SalesTaxRate. You could define a formula field that calculates the sales tax amount by multiplying these two fields together.

To define a formula field:

1. If necessary, display the Field Chooser.
2. Click the New button to display the New Field dialog box (shown earlier in Figure 27.7).
3. Enter a name for the new field in the Name box.
4. Select Formula from the Type list.
5. Click the Edit button to open the Formula Field dialog box (see Figure 27.10).
6. Click the Field button to select each field that you want to use in the formula. Each field name is entered into the Formula box enclosed in brackets.
7. Edit the formula, adding the standard mathematical operators + (addition), – (subtraction), / (division), and * (multiplication) to define the formula.
8. If desired, click the Function button to select from the built-in functions for use in your field formula.
9. When finished, click OK.

FIGURE 27.10

Defining a formula field.

Validating User Input

Many of the problems that arise when a form-based application is used result from the entry of incorrect data. Some errors are impossible to catch, for example if someone mistypes an email address as bill_gates@microsift.com. But you can catch other errors such as:

- An email address without the @ character
- A ZIP code only four digits long
- A data field left blank when an entry is required
- A percentage value way out of range

With the data validation feature available for Outlook forms, you can catch many errors before they cause a problem.

Data validation is performed at the field level. When you add a field to a form, you can define validation rules for it. When a user adds data to the form and then posts or sends it, the rules are evaluated and if a violation is encountered, a message is displayed to the user who can then make the necessary corrections.

You define validation rules on the Validation tab of a field's properties sheet. This is shown in Figure 27.11.

FIGURE 27.11

Use the Validation tab of the properties sheet to create validation rules for a field.

Two types of validation are available, and either one or both can be applied to a field. The first, implemented by selecting the A Value Is Required for This Field option, is used simply to ensure that a field is not left blank.

The second type of validation looks at the data in the field and makes sure that it meets a defined criterion. To implement this type of validation, select the Validate This Field Before Closing the Form option and click the Edit button to define the validation formula. The procedure for this is very similar to that for defining a formula for a formula field as covered earlier in this chapter, and is not repeated here. The one essential difference is that you will create a logical formula, one that evaluates to True (validation successful) or False (validation failed). The syntax for these formulas are the same as for the VBA logical formulas that were covered in Chapter 23.

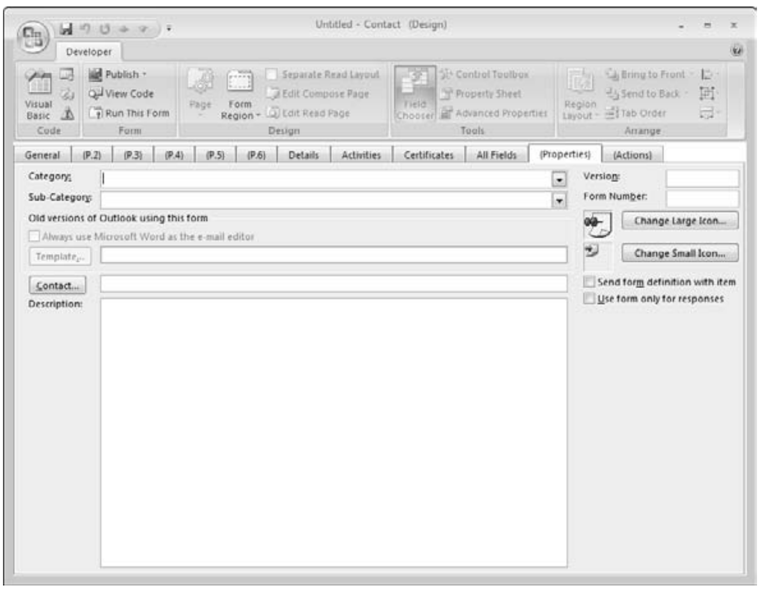
The final step in defining validation rules is to specify the message to display when the validation fails. You can simply type the message in the Display This Message... box or use the Edit button to define a more complex message.

Setting Form Properties

The properties for a form are located on the Properties page when the form is open in the Forms Designer. This page is shown in Figure 27.12. These properties apply to the form as a whole rather than to a specific page or control.

FIGURE 27.12

Setting form properties on the Properties page.



The properties are

- **Category and Sub-Category:** Lets you assign a category and subcategory to the form. These are not the same as Outlook categories, but rather are arbitrary categories that you can use to organize your forms.
- **Contact:** Click this button to associate the form with a contact from your address book.
- **Version and Form Number:** You can use these properties to keep track of changes to the form. For example, when the form is first designed you could assign the version number 1, then when you make modifications you could change the version number to 2.
- **Change Icon:** Use these buttons to change either the small icon or the large icon displayed for the form in Outlook.
- **Send Form Definition with Item:** If you will be sending the form to people who do not have access to the form in the Organizational Forms Library — for example, sending a message to someone outside your company — check this option so the form definition is sent along with the data. This enables people to view the form as it was designed.
- **Use Form Only for Responses:** If this option is selected, people who receive the form and then respond are forced to use the form for their response.

Understanding the Actions Page

The Actions page, shown in Figure 27.13, defines the routing capabilities that the form has. In other words, it specifies what a recipient can do with the form:

- **Reply:** Reply to the original sender with the message subject prefixed by "Re:".
- **Reply to All:** Reply to the original sender and all recipients with the message subject prefixed by "Re:".
- **Forward:** Forward the message with the message subject prefixed by "FW:".
- **Reply to Folder:** Post to a folder without adding anything to the subject.

To modify any of these actions, double-click the action you want to change to open the Form Action Properties dialog box for that action. This is shown in Figure 27.14. The options are

- **Enabled:** This option must be selected for the action to be available to a recipient.
- **Form Name:** Specifies the form used for the action. Normally this is the same form but you can specify that another form be used for replies and forwards if desired.
- **When Responding:** This option determines certain aspects of how a response is created, such as whether the original text is included in the response. Normally this is set to Respective User's Default, which means that the response settings that are in effect on the recipient's system will be used.
- **This Action Will:** Specifies what happens when the recipient chooses the action.
- **Subject Prefix:** Specifies any prefix that will be added to the subject line.

FIGURE 27.13

The Actions page specifies a form's routing capabilities.

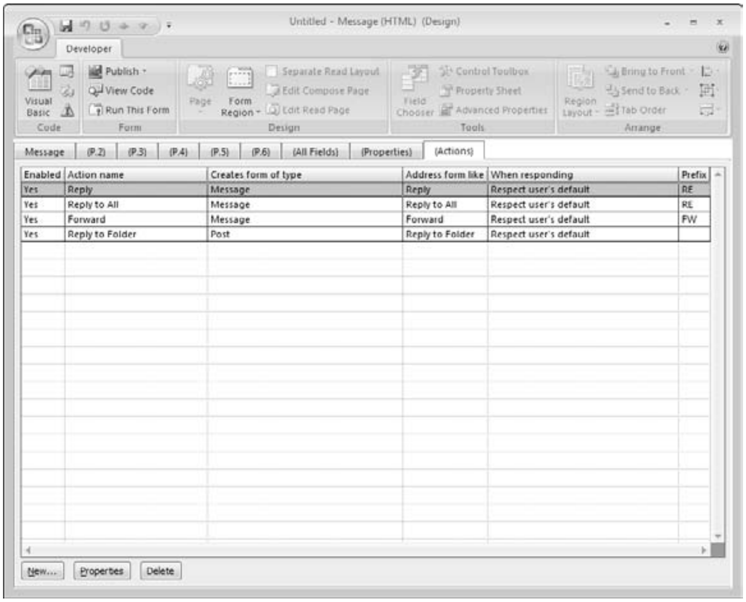


FIGURE 27.14

Setting options for an individual form action.

You can also define new actions for a form. An *action* in this context means that a form will be created. To define a new action, click the New button at the bottom left of the Actions page. Outlook

will open the dialog box shown in Figure 27.15. This is essentially identical to setting properties for an existing action with these additions:

- **Name:** Enter a name for the action.
- **Form Name:** Specify the name of the form that the action will open either by clicking the down arrow and selecting a form or by typing in the form name.
- **Check:** If you type in a form name, click this button to verify that the specified form is available in the Forms Library.
- **Show Action On:** Specify where on the form the action should be displayed.

FIGURE 27.15

Defining a new action for a form.

Using VBScript in Your Forms

VBScript is a programming language that can be used to add functionality to Outlook forms. It is a lightweight version of the VBA language you use in Outlook macros. Unlike VBA macro code, however, VBScript code is part of the form and its functionality goes wherever the form goes. Furthermore, VBScript was designed to be safe, lacking many of the programming commands that could be damaging if used in a malicious manner. Examples of things you can do with VBScript are to create a form that interacts with an external database, write form data to an XML file, and manipulate controls on the form.

To work with a form's VBScript, click the View Code button in the Form section of the ribbon. This opens the Script Editor, shown in Figure 27.16 (with no code visible). You enter and edit your code here, then when finished close the Script Editor to return to the form — the code is automatically saved with the form.

FIGURE 27.16

The Script Editor.

Many of the syntax elements of VBScript are identical to those in VBA (refer to Chapter 23). A detailed treatment of VBScript is beyond the scope of this book, but I will present an example to give you a feel of how it is used.

Suppose you have designed a custom form with a page that contains several TextBox controls for the user to enter data. You want to provide an easy way for the user to clear all the TextBox controls and start over. VBScript is perfect for this.

First, add a CommandButton to the form and use its property sheet to change its caption to `Clear`. Then, open the Script Editor and enter the code shown here. This assumes that the page the controls are on is named PageName and that the TextBox controls you want to clear are named TextBox1, TextBox2, and TextBox3:

```
Sub CommandButton1_Click()

Set MyPage = Item.GetInspector.ModifiedFormPages("PageName")
MyPage.Controls("TextBox1").Value = ""
MyPage.Controls("TextBox2").Value = ""
MyPage.Controls("TextBox3").Value = ""

End Sub
```

The first line of code gets a reference to the form page that you want to work with. The other lines each get a reference to a TextBox and set its `Value` property to a blank string.

Summary

This chapter has shown you some of the more advanced aspects of creating custom forms in Outlook. You learn more about publishing and using custom forms when you explore Microsoft Exchange Server in Chapter 28.

Part VI

Additional Topics

IN THIS PART

Chapter 28

Using Outlook with Exchange Server

Microsoft Exchange Server is designed to facilitate communication and collaboration among groups of people. It works in conjunction with client applications such as Outlook, and provides services such as email, instant messaging, sharing of calendars and tasks, thin-client (that is, browser) based access to email, and support for mobile devices.

This chapter shows you how to get the most out of Outlook when you are using it with an Exchange account. It does not cover aspects of Exchange not specifically related to Outlook, such as Exchange Server administration.

Be aware that Exchange Server is a complex piece of software with lots of options, which may be set differently by the Exchange administrator. There are also different versions of Exchange Server in use at different organizations. For these reasons you cannot be sure that each Exchange Server account will work exactly the same as all the others.

IN THIS CHAPTER

Understanding Exchange Server

Exchange Server is designed to facilitate the exchange of information between users. An Exchange Server account may have just a few users, dozens, or even hundreds. Each individual user has his own username and password that he uses to log on to the account. The username and password are part of the information that must be specified when setting up your Exchange account in Outlook, as was covered in Chapter 3.

Central to the concept of Exchange is the fact that all information — your received emails, your calendar, your tasks, and so on — is stored on the server. Most Outlook users will have a local copy of this information, stored

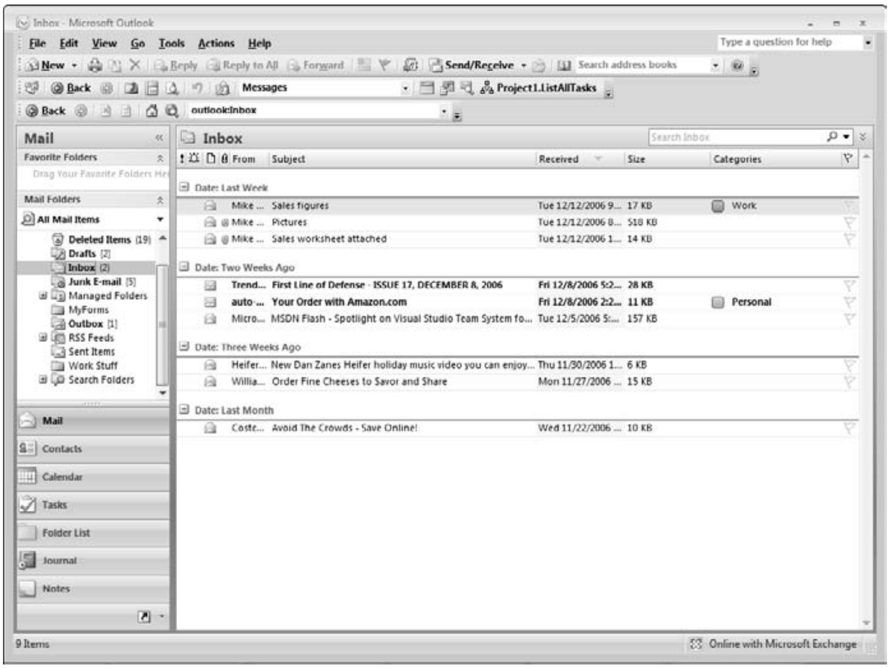
in an Offline Folders File regularly synchronized with the information on the server. It is this fact — that all users' information is stored centrally — that gives Exchange Server its power in terms of collaborating and sharing information with others.

In many ways, using Outlook with an Exchange Server account is no different from using it with a regular — that is, non-Exchange — email account. You'll have an email address and can send and receive messages. You'll have all the usual folders — Inbox, Contacts, Tasks, Search Folders, and so on. You also have some other folders, called public folders that are central to the way Exchange Server works, as is explained soon. You can see the folder structure of a typical Exchange account in Figure 28.1.

What's different in Exchange is that you can give other Exchange users the rights to use your folders. For example, if you have an assistant, you could give him the rights to view your Calendar folder and to schedule meetings for you. Or, while you are away on vacation, you could give a colleague permission to view and respond to emails you receive so that important messages are not ignored until you come back.

FIGURE 28.1

An Exchange account includes the same folders present in a non-Exchange account.

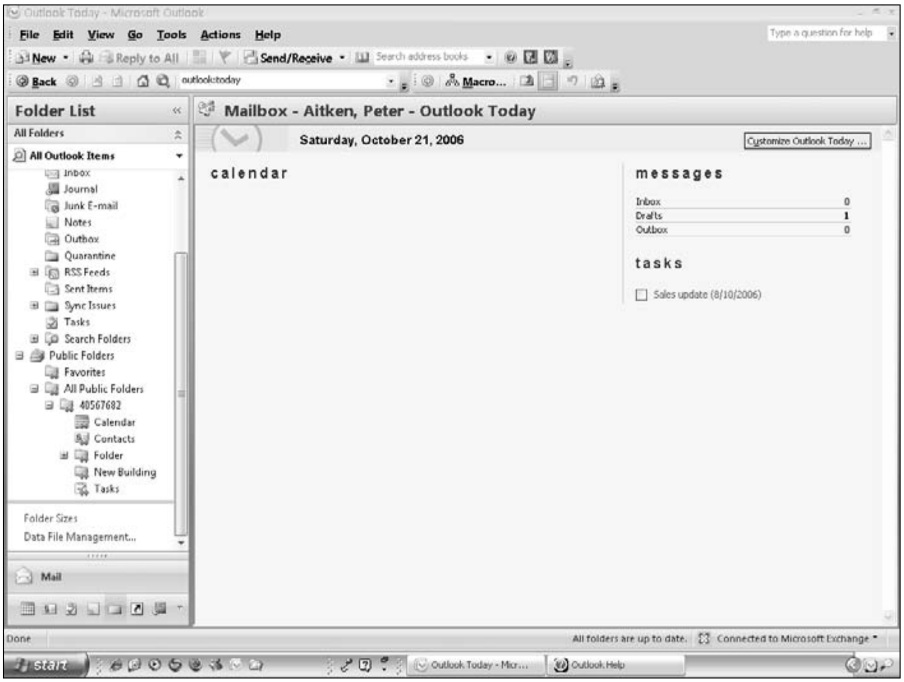


A fundamental part of Exchange is its *public folders*, which are also displayed in Outlook as shown in Figure 28.2. As the name suggests, these are folders that do not belong to any individual but are accessible to any user (although the Exchange administrator can restrict availability of public folders as needed). When you keep information, such as your contacts or calendar, in a public folder it can easily be used by others. Public folders are also central to the full use of forms-based applications.

Many aspects of using Outlook with an Exchange account are identical to using a non-Outlook email account. There are some differences, however, as well as added capability, and these are the topic of this chapter.

FIGURE 28.2

Public folders are an important aspect of an Exchange account.



Understanding Offline Folders Files

Exchange stores all your information — messages, appointments, tasks, and so on — on the server. After all, this is a main function of Exchange: to provide a central and sharable repository for information. Does this mean you cannot work with this information when you are not connected to the server? No, because you can use Offline Folders.

An *Offline Folders File* is a local copy of all your Exchange information. When you are not connected you can work with this information, then when you reconnect the Offline Folders File is synchronized with the Exchange server. Changes you made while working offline are copied to the server and new information on the server, such as email messages you received while offline, are downloaded.

From the perspective of the user, an Offline Folders File is exactly like a Personal Folders File (PST). The folders display in the navigation pane in the same way, and you create, edit, and move items in the same way. The difference is that a PST file remains local and is never synchronized with any server.

When you set up Outlook to work with an Exchange server, the Offline Folders File is set up automatically. It is named Outlook.ost by default and for Windows XP users is located in C:\Documents and Settings*username*\Local Settings\Application Data\Microsoft\Outlook (the location may be different if you are using Vista). The location of this file is rarely of any interest to the user. However, you must attend to details of when synchronization occurs and which folders are synchronized.

By default, Outlook uses Cached Exchange Mode, explained in the next section, to keep your offline folders synchronized with the server. Though you can turn Cached Exchange Mode off, there is rarely any reason to do so and I do not recommend it.

Using Cached Exchange Mode

Cached Exchange Mode is the default way that Outlook synchronizes offline folders with the server. When using this mode, Outlook always uses the local copy of your data — that is, the offline folders — and automatically synchronizes the local copy with the Exchange server. To make sure that Outlook is using Cached Exchange Mode:

1. Select Account Settings from the Tools menu to display the Account Settings dialog box.
2. If necessary, click the E-mail tab.
3. Select your Exchange account in this list (it may be the only entry in the list).
4. Click the Change button to display the Change E-mail Account dialog box.
5. Make sure that the Used Cached Exchange Mode option is selected.

If you change the setting, you will have to exit and then restart Outlook to put the new setting into effect.

Exchange and Other Email Accounts

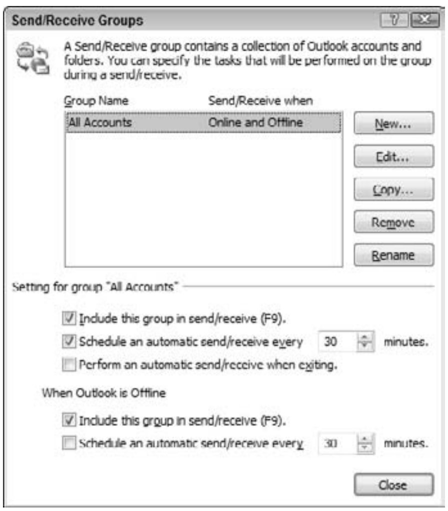
It is possible to have both an Exchange account and a POP/IMAP email account defined as part of the same Outlook profile. In this situation, both sets of folders will be displayed in the navigation pane. However, some people who have both kinds of accounts prefer to set up a separate Outlook profile for each account, to avoid confusion. Setting up profiles was covered in Chapter 3.

When using Cached Exchange Mode, all folders are kept synchronized. You can also perform a manual synchronization by pressing F9. This is useful when, for example, you want to ensure that your local data is completely up to date. You may want to specify which folders are synchronized when a manual synchronization is performed. For example, you may want to manually synchronize only mail items and let your other folders be synchronized during the automatic updates. To change manual send/receive settings:

1. Select Send/Receive from the Tools menu.
2. Select Send Receive Settings and then select Define Send/Receive Groups. Outlook displays the Send/Receive Groups dialog box, shown in Figure 28.3. (Note: To quickly open this dialog box without using the menus, press Ctrl+Alt+S.)
3. If you have more than one group name, select the one that includes your Exchange account.

FIGURE 28.3

Changing manual send/receive settings for your Exchange account.



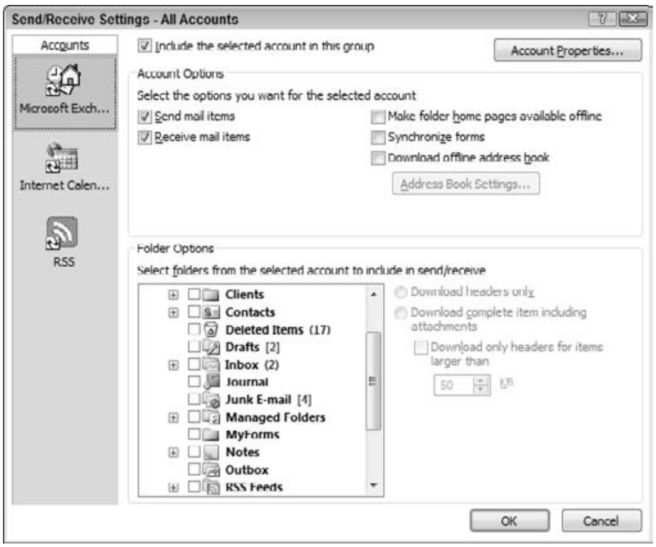
4. Click the Edit button to open the Send/Receive Settings dialog box (see Figure 28.4):
5. In the Accounts list on the left, click your Exchange account.
6. Make sure that the Include the Selected Account in This Group option is selected.
7. In the Folder Options section, select the send/receive options — these are all self-explanatory.
8. In the Account Options section, select which individual folders are synchronized by placing a checkmark in the adjacent box. These are the folders that will be available offline.

NOTE For some types of folders, such as the Inbox, you can use the options on the right (grayed out in the figure) to specify whether headers only or complete items are downloaded. The latter option results in longer synchronization times, but lets you read items immediately.

9. Click OK to return to the Send/Receive Groups dialog box.
10. Click Close.

FIGURE 28.4

Specifying the send/receive details.



Quick Offline Use

To quickly change whether an individual folder is available offline, select the folder in the navigation pane and then select Tools, Send/Receive, Send/Receive Settings.

Working Offline

In Outlook, *offline* does not mean that a connection to the server is not available. Of course, if this connection is not available you have no choice but to work offline, but you can also work offline when the connection is available.

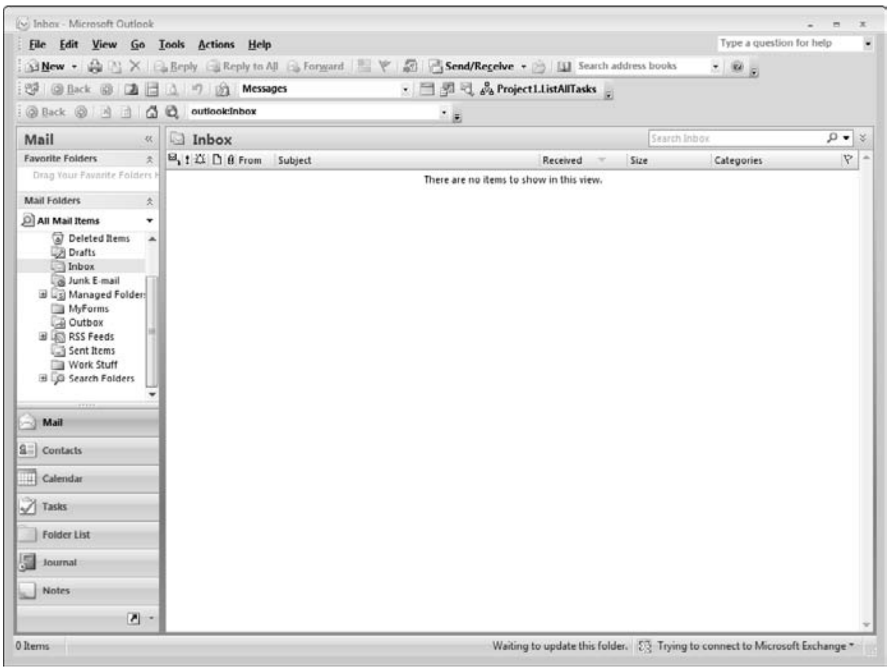
When you are online, Outlook is connected to your Exchange server. Mail you receive is available immediately, and mail you send is sent immediately. You can also work offline even when the server connection is available, perhaps to avoid connection fees.

If you are using Cached Exchange Mode, as explained in the previous section, Outlook automatically switches between online and offline modes depending on the availability of the server connection. Cached Exchange Mode is recommended because the state of the server connection is essentially transparent to the user. Information about the connection state and the status of synchronized folders is displayed in the status bar, as shown in Figure 28.5.

If you click the arrow next to the connection state, Outlook displays a small popup menu. You can use this menu to manually switch to offline mode and, when in offline mode, to try to reconnect to the server. The other commands on this menu let you control certain aspects of the synchronization process.

FIGURE 28.5

Connection state and folder status are displayed in the status bar.



Configuring Outlook for Exchange Server

In Chapter 3, you learned the fundamentals of setting up an Exchange Server account in Outlook. There are some additional settings that relate to how Outlook and Exchange work together. Most users will not need to change these settings, but they are explained here just in case. To access these settings:

1. Select Account Settings from the Tools menu to display the Account Settings dialog box.
2. Make sure that the E-mail tab is displayed.
3. If you have more than one email account, click your Exchange account.
4. Click Change to open the Change E-mail Account Settings dialog box.
5. Click the More Settings button to open the Microsoft Exchange dialog box. This dialog box has several tabs, which are covered in the following sections.

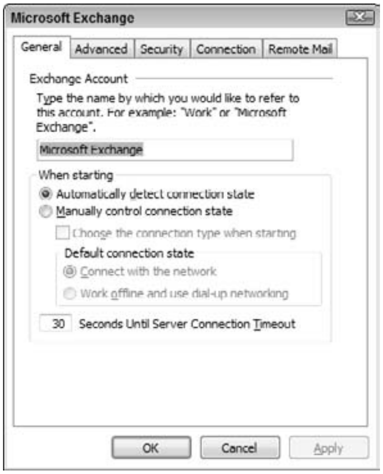
Setting General Properties

The General tab in the Microsoft Exchange dialog box, shown in Figure 28.6, displays these options:

- **Name:** The name Outlook displays for this account.
- **Automatically Detect Connection State:** This option tells Outlook to detect the *connection state* — that is, online or offline — when the program starts and to run in the appropriate mode. Use this setting when you connect to Exchange Server with a network connection always available (for example, a LAN).
- **Manually Control Connection State:** Lets the user control the connection state when the program starts. Use when you are not always connected to the network, such as a dial-up connection or a notebook computer. The following three settings are relevant when you select this option.
  - **Choose the Connection Type When Starting:** Select this option if you want to be able to choose whether Outlook works online or offline each time it starts. If this option is not selected, Outlook automatically makes this determination (this is the default).
  - **Connect with the Network:** Choose this option to connect to Exchange through a network rather than a dial-up connection. This option is appropriate when your computer is connected to an always-on network (LAN or DSL, for example).
  - **Work Offline and Use Dial-Up:** Select this option if you connect to Exchange using dial-up networking.
- **Seconds Until Server Connection Timeout:** This is the amount of time Outlook waits for a connection to Exchange before timing out. If you are using a slow network connection you might want to increase this value.

FIGURE 28.6

Setting general properties for an Exchange Server account.



Setting Advanced Properties

The Advanced tab of the Microsoft Exchange dialog box, shown in Figure 28.7, presents options related to mailboxes, security, and the Offline Folders File.

FIGURE 28.7

Setting advanced properties for an Exchange Server account.

The Mailboxes section of this dialog box lets you add additional mailboxes that will be opened along with your own default mailbox. This may be desirable if you own more than one mailbox on the server or if you have been granted delegate permission (as explained later in this chapter) for one or more other users' mailboxes. To add a mailbox, click the Add button and type in the mailbox name.

The other options on this tab are

- **Use Cached Exchange Mode:** Cached Exchange Mode was explained earlier in this chapter. You can turn this mode on or off here as well as in the Change E-mail Account dialog box as described earlier.
- **Download Shared Folders:** Select this option if you want Outlook to automatically download any shared folders. If this option is not selected, a shared folder will be downloaded only when you open it.
- **Download Public Folder Favorites:** If this option is selected, Outlook will cache any public folders you have added to Favorites under Public Folders. Be aware, however, that this can slow down the synchronization process if these folders contain a lot of items and are very active.
- **Offline Folder File Settings:** Click this button to verify the name and location of your Offline Folders File (although it is rare that you will need to change either of these). You can also compact the file to reduce its size — something that's good to do once in a while.

Setting Security Properties

The Security tab, shown in Figure 28.8, displays these three options:

- **Encrypt Data...:** If this option is selected, data transmitted between Outlook and Exchange is encrypted for greater security with a small speed penalty.
- **Always Prompt for Logon Credentials:** If this option is selected, Outlook will prompt you for your username and password each time it tries to connect to the Exchange server. If other people have access to your computer, you may want to select this option to prevent them from accessing your mailbox.
- **Logon Network Security:** This option specifies the kind of authentication that Outlook uses when connecting to Exchange. There are three options available: You can select NTLM Password Authentication (NTLM stands for Windows NT LAN Manager) and Kerberos Password Authentication to specify that Outlook should use that security model. You can also select Negotiate Authentication (the default), which tells Outlook to use whichever type of security the server is using. You rarely, if ever, need to change this setting.

FIGURE 28.8

Setting security properties for an Exchange Server account.

Setting Connection Properties

The Connection tab in the Microsoft Exchange dialog box, shown in Figure 28.9, specifies how Outlook connects to Exchange. The options available here are

- **Connect Using My LAN:** Select this option if your computer is permanently connected to an always-on network, such as a LAN, a cable modem, or DSL.
- **Connect Using My Phone Line:** Select this option to use an existing dial-up connection to connect to the network via your phone line.
- **Connect Using Internet Explorer's or a 3rd Party Dialer:** Select this option if you use a dialer, either Internet Explorer's or another one, to connect.
- **Modem:** The settings in this section are relevant only if you select the Connect Using My Phone Line option. You can choose an existing dial-up connection from the list, modify its properties, or add a new dial-up connection.
- **Connect to Microsoft Exchange Using HTTP:** Set this option as your Exchange administrator or setup guide instructs you. If you select it, use the Exchange Proxy Settings button to enter detailed HTTP settings — these will be provided to you by your Exchange administrator.

Setting Remote Mail Properties

You set Remote Mail properties on the Remote Mail tab (see Figure 28.10). When using Remote Mail, which is explained later in this chapter, you have the option of downloading message headers only without the body or any attachments, which can speed the download process if you have a slow connection. You can review message headers and then download only those you need. The settings are

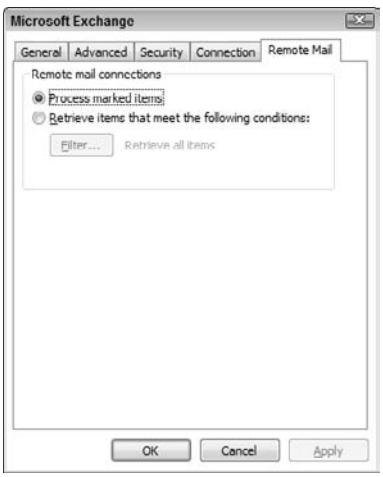
- **Process Marked Items:** Retrieve only those items that you have marked for download.
- **Retrieve Only Items That Meet the Following Conditions:** Retrieve only those items that meet the filter conditions you define.
- **Filter:** Click this button to define a Remote Mail filter. You can filter based on who messages are from, the subject, the size, the presence of attachments, and various other criteria.

FIGURE 28.9

Setting connection properties for an Exchange Server account.

FIGURE 28.10

Setting Remote Mail properties for an Exchange Server account.



Voting

Exchange Server lets you conduct polls by sending email messages with a question and voting buttons. You can then tally the responses and use the information as needed. The people you send a voting message to must be using Exchange, too. Other people will receive the message but will not have the voting buttons available.

Requesting a Vote

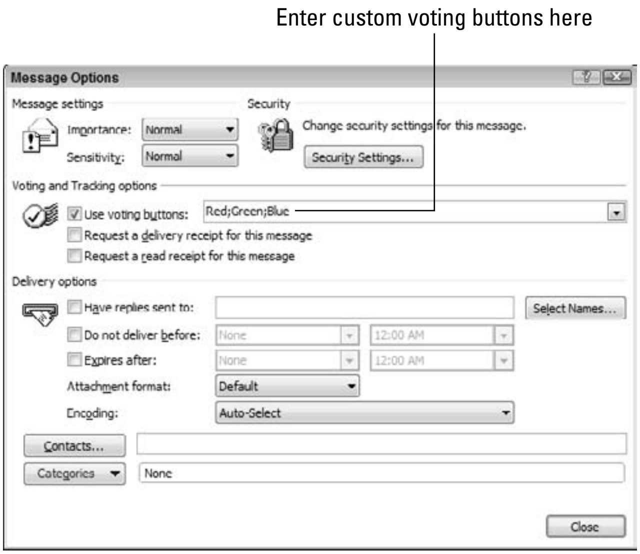
To send a message for people to vote on, create and address the message as usual. On the Options ribbon, click the Use Voting Buttons button and select the kind of buttons you want:

- Approve and Reject buttons
- Yes and No buttons
- Yes, No, and Maybe buttons
- Custom: Opens the Message Options dialog box where you can specify the buttons separated by semicolons. For example, Figure 28.11 shows how to specify Red, Green, and Blue buttons.

When finished, complete and send the message as usual.

FIGURE 28.11

Specifying custom voting buttons.

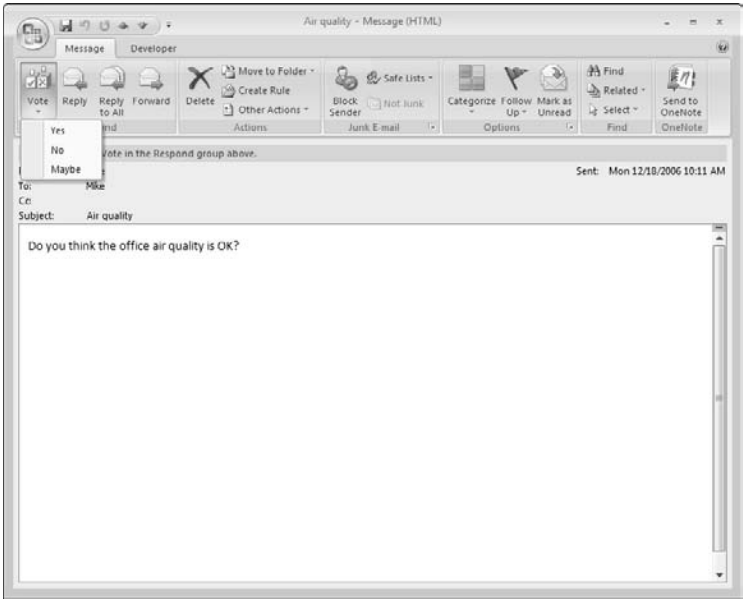


Responding to a Voting Request

When you receive a voting message, you will be prompted to vote by a message in the header and can click the Vote button to select your response (see Figure 28.12). You have the choice of sending the response immediately or editing it first.

FIGURE 28.12

Cast your vote by clicking these buttons.



It's possible to vote more than once, but don't bother — if you do, Outlook ignores all but your first vote.

WARNING **Think before you vote! Once your vote has been sent you cannot change it.**

Tallying the Votes

Replies to voting requests go to the original sender as regular messages that can be opened and read as usual. The vote is displayed in the Info Bar just below the ribbon, as shown in Figure 28.13. Outlook keeps track of all responses, and you can view the results by opening any voting response message, clicking the Info Bar, and selecting View Voting Responses. Outlook displays a list of all the voting messages you sent, the response to each one (or a blank if the response has not been received), and the totals, as shown in Figure 28.14.

FIGURE 28.13

A voting response message displays the vote in the Info Bar.

Voting response

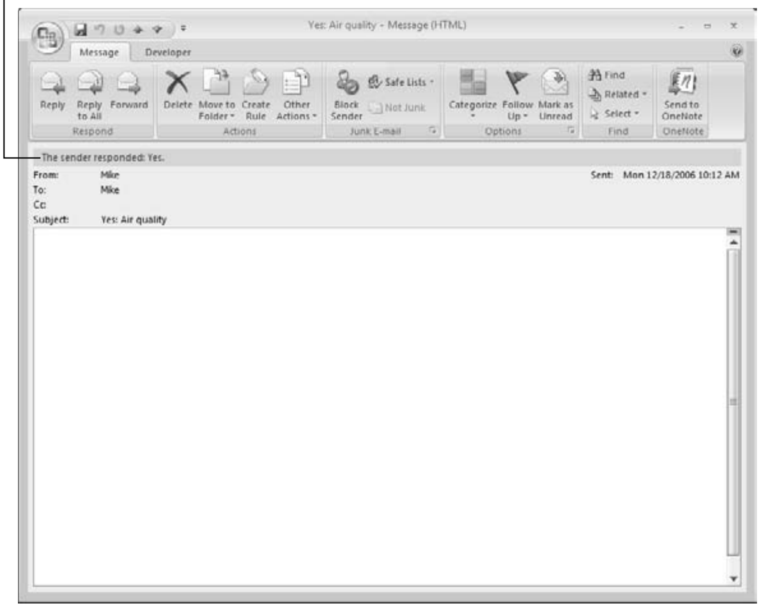
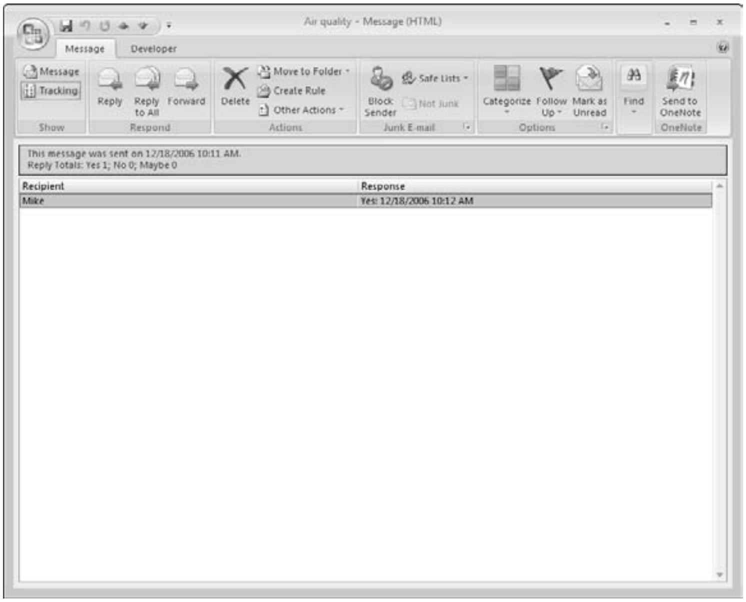


FIGURE 28.14

Viewing a summary of voting responses.



Setting Vote Tracking Options

Outlook has two options that affect the way Outlook deals with voting responses. These options are in the Tracking Options dialog box, shown in Figure 28.15. You access this dialog box as follows:

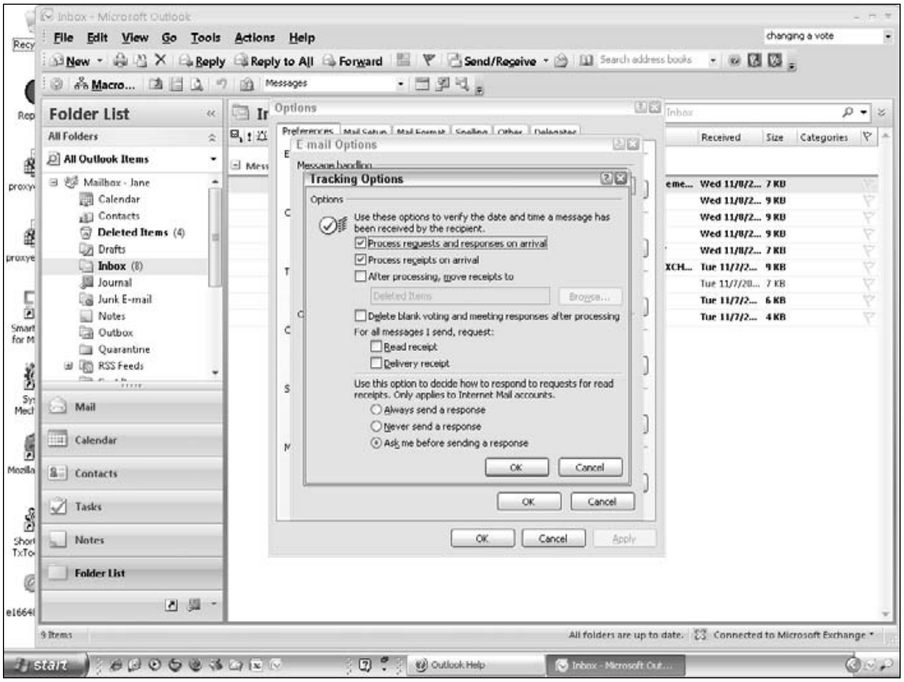
1. Select Options from the Tools menu to open the Options dialog box.
2. On the Preferences tab, click E-mail Options to open the E-mail Options dialog box.
3. Click the Tracking Options button to open the Tracking Options dialog box.

The two options in this dialog box related to voting are

- **Process Requests and Responses on Arrival:** If this option is selected, Outlook tallies votes automatically as each response is received. Otherwise, you must explicitly open each response in order for Outlook to tally it.
- **Delete Blank Voting and Meeting Responses After Processing:** If this option is selected, Outlook automatically deletes voting responses (and meeting responses too) after they are tallied if they have no additional comments added by the responder.

FIGURE 28.15

Setting tracking options related to voting.



Recalling Sent Messages

Exchange gives you the option of recalling a message you sent to another Exchange user as long as that person has not yet read it. To do so:

1. Open the Sent Items folder.
2. Double-click the message you want to recall to open it.
3. Click Other Actions and select Recall This Message to open the Recall This Message dialog box (see Figure 28.16).
4. Select options as described here:
   - **Delete Unread Copies of This Message:** Recall the message without creating a replacement message.
   - **Delete Unread Copies of This Message and Replace with a New Message:** Recall the message and open a new message to create a replacement message.
   - **Tell Me...:** Select this option if you want to be notified whether or not the recall was successful for each message recipient.
5. Click OK.

FIGURE 28.16

Recalling an unread message.

Using Forms with Exchange

You learned about designing custom Outlook forms in Chapters 26 and 27. As mentioned earlier, Outlook custom forms really come into their own when used with an Exchange server. This is because you can publish a form to Exchange so that it becomes available to all users of the Exchange server.

Publishing a Form

Basically, there are two options for publishing a form:

- Publish it to a forms library where it will be available to all users.
- Publish it to the public folder where it is meant to be used.

After completing the design of your form, publish it as follows:

1. Click the Publish Form button on the ribbon to open the Publish Form As dialog box.
2. Enter a descriptive display name for the form.
3. If desired, change the form name — but usually this is left as the default, which is the same as the display name.
4. Open the Look In list (see Figure 28.17) and select the destination folder for the form.
5. Click Publish.

Using a Form

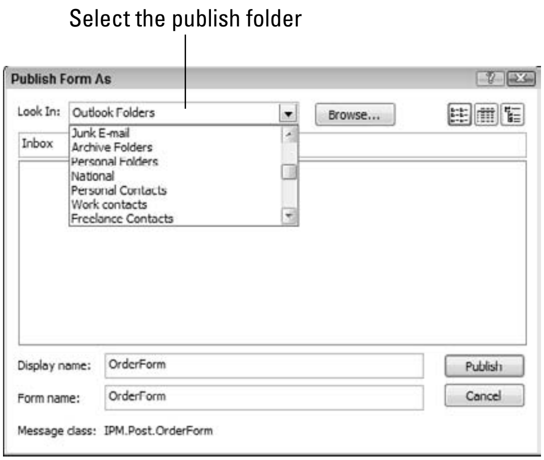
To use a form, select Forms from the Tools menu and select Choose Form from the next menu. Navigate to the folder containing the form and open it — that's all there is to it.

Keep Unfinished Forms Separate

It's a good idea to keep forms that are in the process of being designed separate from forms that have been completed and tested. You can do this by creating a folder accessible only to you or the members of the form design team and publishing forms not complete to that location. Only when the form has been completely tested should you publish it to a public folder for general use.

FIGURE 28.17

Selecting the folder to publish a form to.



Working with Outlook's Group Schedules

A *group schedule* is just what is sounds like — a calendar that shows busy and free time for multiple people. Group schedules can greatly simplify the task of scheduling a meeting for members of a team, to allow a supervisor to get an overview of how employees are spending their time, or to permit a receptionist to locate specific individuals.

Creating a Group Schedule

To create a new group schedule, select View Group Schedules from Outlook's Actions menu. Outlook opens the Group Schedules dialog box, as shown in Figure 28.18. Any existing group schedules are listed here. Then:

1. Click the New button to open the Create New Group Schedule dialog box.
2. Enter a name for the new group schedule and click OK.
3. Outlook opens a blank schedule as shown in Figure 28.19. You can add members in three ways:
   - To enter a name manually, click where it says Click Here to Add a Name, then type in the member's name. The name must be something that Exchange recognizes as a user.
   - To select a member from your address book, click the Add Others button and select Address Book from the menu. Outlook opens a dialog box where you can select from the available address books and then select one or more members.
   - To select a member from a public folder, click the Add Others button and select Public Folder from the menu. Outlook will open a dialog box where you can navigate to the public folder and select members.
4. When all group members have been added, click Save and Close.

FIGURE 28.18

The Group Schedules dialog box.

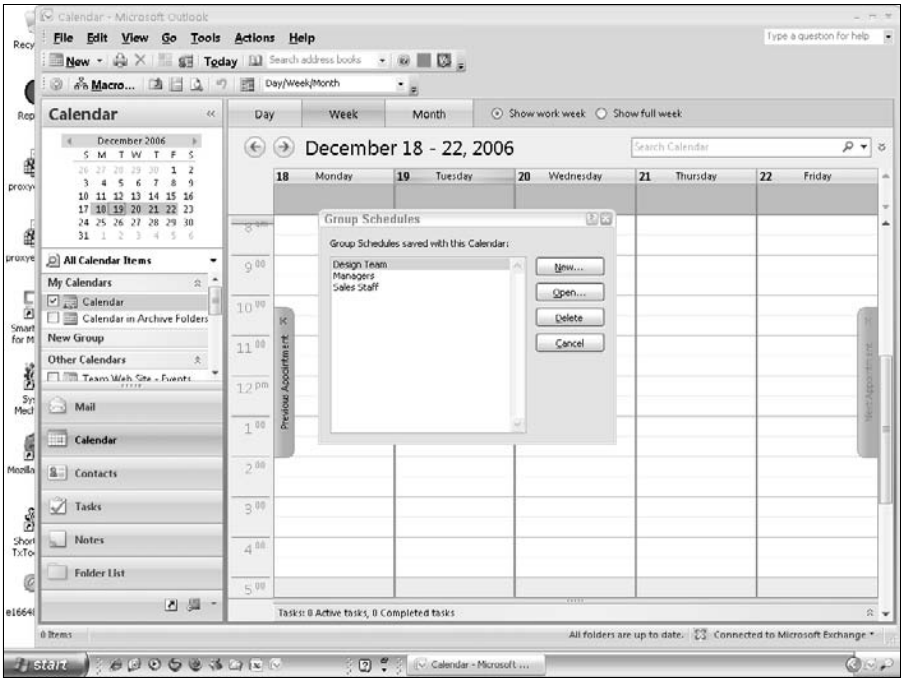
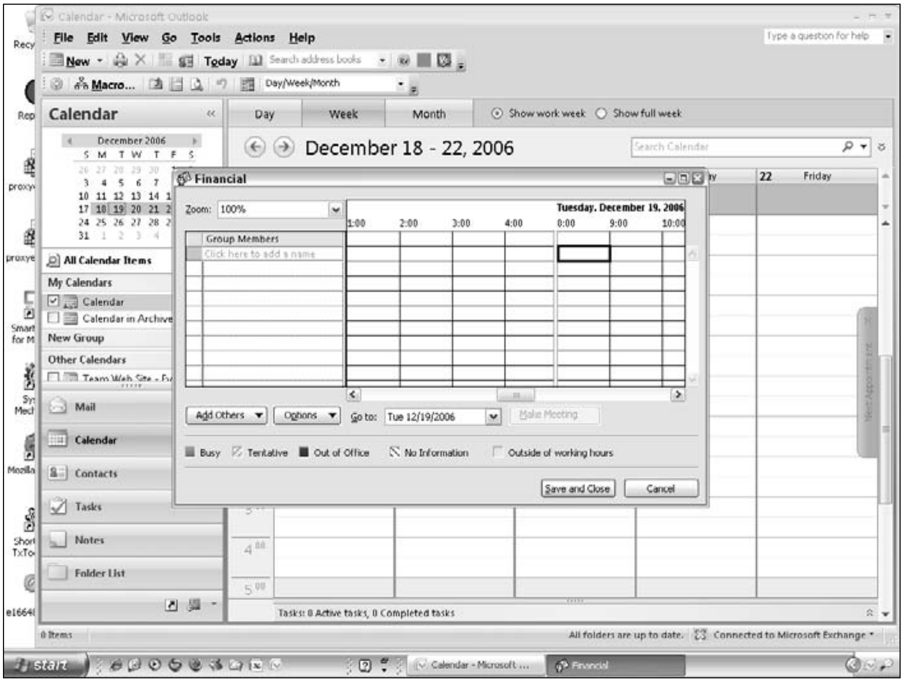


FIGURE 28.19

A blank group schedule before any members are added.



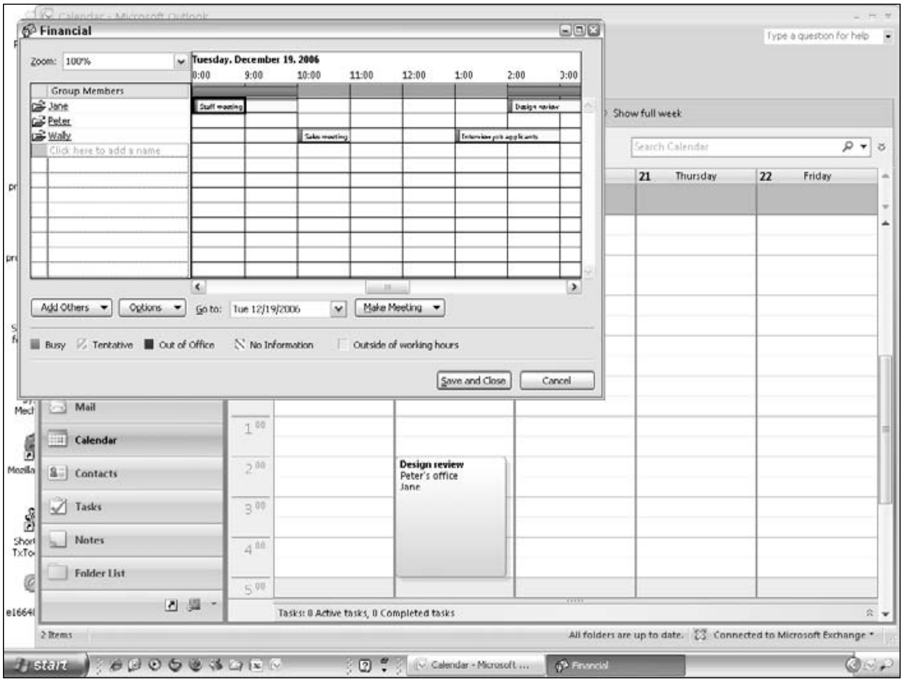
Using Group Schedules

To use a group schedule, select View Group Schedules from Outlook's Actions menu. Outlook opens the Group Schedules dialog box (shown earlier in Figure 28.18). Click the schedule you want to use, then click Open. Outlook displays the schedule with each member's schedule indicated in the row next to his or her name, as shown in Figure 28.20. Blocks of time are marked as one of the following according to the legend at the bottom of the dialog box:

- **Busy:** The member is busy and cannot be scheduled for anything else.
- **Tentative:** The member has tentatively scheduled this block of time, for example if they have an unconfirmed appointment. You can schedule over a tentative block of time and the member will have to decide between the conflicting events.
- **Out of Office:** The member is away from the office and therefore not available.
- **Open:** The member has nothing scheduled. You can schedule over these blocks of time.
- **No Information:** If Exchange has no information about the member's schedule it is marked this way. It might indicate that the member does not use Outlook or that there is a problem with their account.

FIGURE 28.20

A group schedule shows the members' free and busy time.



Scheduling Meetings

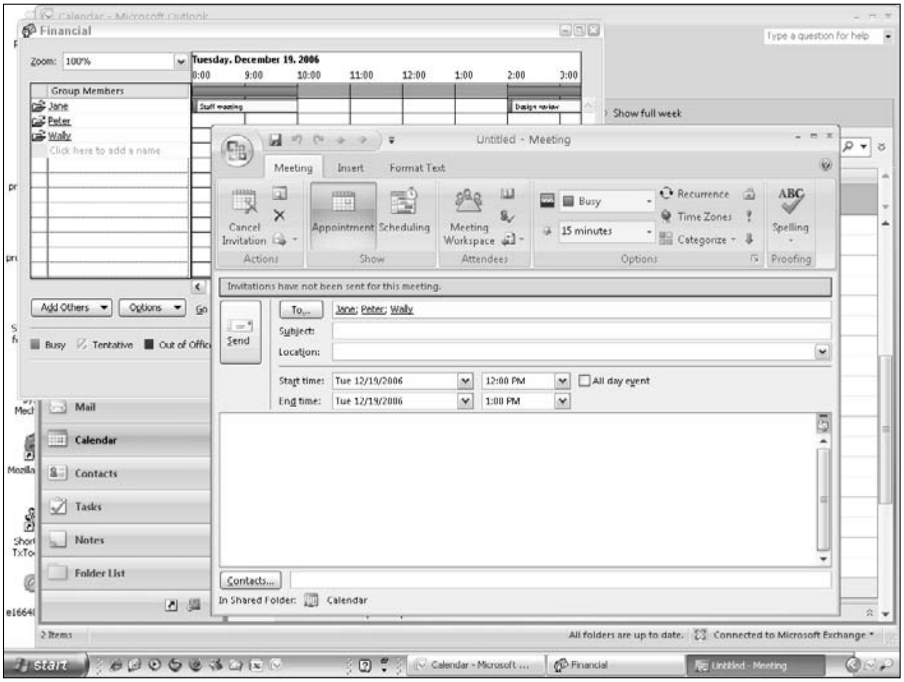
You can schedule a meeting with individual members of the group or with the entire group. When you schedule a meeting, a meeting request is sent to the attendees, and they can respond by accepting the meeting, tentatively accepting it, or declining.

To schedule a meeting with the entire group:

1. On the schedule, click the block of time when you want to hold the meeting. This step is optional but convenient.
2. Click the Make Meeting button.
3. Select New Meeting with All from the menu. Outlook opens a meeting request form addressed to all group members, as shown in Figure 28.21.
4. Enter the subject and, optionally, a location for the meeting.
5. If necessary, adjust the date and/or time of the meeting.
6. If desired, add a message to the request.
7. Click the Send button.

FIGURE 28.21

Sending a meeting request to all group members.



To schedule a meeting with one or more group members:

1. On the schedule, click the block of time when you want to hold the meeting in the row of the person you want to invite.
2. Click the Make Meeting button.
3. Select New Meeting from the menu. Outlook opens a meeting request form addressed to the selected member (this form was shown earlier in Figure 28.21).
4. To invite additional people to the meeting, click the To button and select from your address book.
5. Complete the subject and other elements of the meeting request.
6. Click Send.

Sending Email to Group Members

You can easily send email to the entire group or to single selected members. To do so, click the Make Meeting button and select one of these commands from the menu:

- **New Mail Message:** Creates an email message addressed to the selected group member (select a member by clicking their row in the schedule).
- **New Mail Message with All:** Creates an email message addressed to all group members.

Setting Group Schedule Options

The Options button in the Group Schedule dialog box provides you with the following options:

- **Show Only My Working Hours:** If this option is selected, the group schedule will display only the days and times that you have designated as working hours.
- **Show Calendar Details:** If this option is selected, the group schedule will display the meeting subject for each block of time in which you have scheduled an appointment.
- **AutoPick:** Lets you configure how the AutoPick feature works. AutoPick was covered in Chapter 12.
- **Refresh Free/Busy:** Select this command to update the group schedule with the latest information from the members' calendars. Though the group schedule is updated automatically on a regular basis, selecting this command ensures you can see information that other members may have entered very recently.

Other Group Schedule Actions

There are several other actions that you can take when a group schedule is open:

- To view an individual member's calendar, double-click the small folder icon to the left of the member's name.
- To remove members from the group, right-click their name and select Cut from the popup menu.
- To view information about members, double-click their name.

Delegating Outlook Tasks

When you work in a group — which is usually the case when you are using Outlook with an Exchange server — you may want to let certain other people perform specified tasks for you. For example, you could permit your assistant to access your Inbox to review your received messages before you see them, or you could permit your manager access to your task list to assign you tasks. In Outlook, this process is called *delegation*, and the person to whom you give access to Outlook

Delegation Versus Folder Permissions

In some situations, you may be able to accomplish the desired sharing by granting folder access rather than creating a delegate. What sets a delegate apart is that this person can send items on your behalf including creating and responding to meeting requests. See the section "Granting Folder Access" later in this chapter.

data is a *delegate*. Delegation is done on a per-folder basis and is available with these folders: Calendar, Tasks, Inbox, Contacts, Notes, and Journal. A user who has been granted delegate permissions is sometimes referred to as an *assistant*.

When you use delegation, you can assign one of the following levels of permission to an assistant:

- **None:** This is the default — it does not let the assistant access the folder at all.
- **Reviewer:** This level of permission allows the assistant to read items but not add new items or edit existing items.
- **Author:** This level of permission allows the assistant to read items and add new items but not to edit existing items.
- **Editor:** This level of permission allows the assistant full access to read, create, and edit items.

Creating Delegates

This section shows you how to create a delegate and define his/her permissions:

1. Select Options from the Tools menu to open the Options dialog box.
2. Click the Delegates tab (shown in Figure 28.22). If you have not yet created any delegates, this list will be empty, as shown in the figure.
3. Click Add to open the Add Users dialog box (see Figure 28.23).
4. If necessary, select the desired address book in the Address Book list.
5. Double-click the desired user. You can select more than one user if you want each to have the same delegate permissions.
6. Click OK to open the Delegate Permissions dialog box (see Figure 28.24).
7. For each of the folders listed in this dialog box, use the adjacent list to select the permission that you want the delegate to have: Reviewer, Author, Editor, or None.

8. Select other options as follows:
   - **Delegate Receives Copies...:** If you select this option, the delegate will receive a copy of any meeting-related messages sent to you.
   - **Automatically Send a Message...:** If you select this message, the delegate(s) you define will be sent a message detailing the delegate permissions that they have been granted.
   - **Delegate Can See My Private Items:** If you select this option, the delegate will be able to see items that you have marked as Private.
9. Click OK to complete the process.

FIGURE 28.22

The first step in creating a delegate.

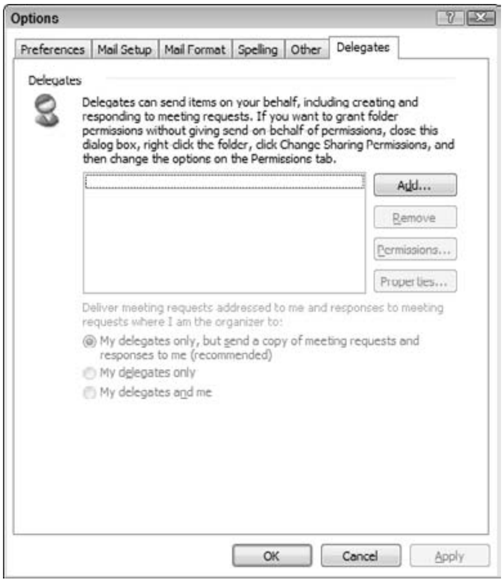
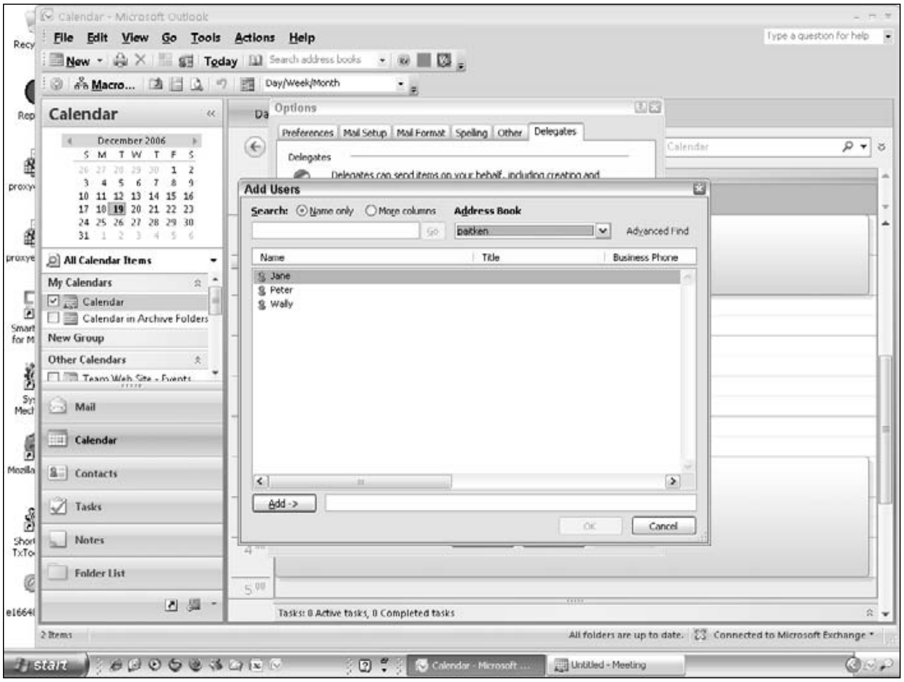


FIGURE 28.23

Selecting users to be given delegate permissions.

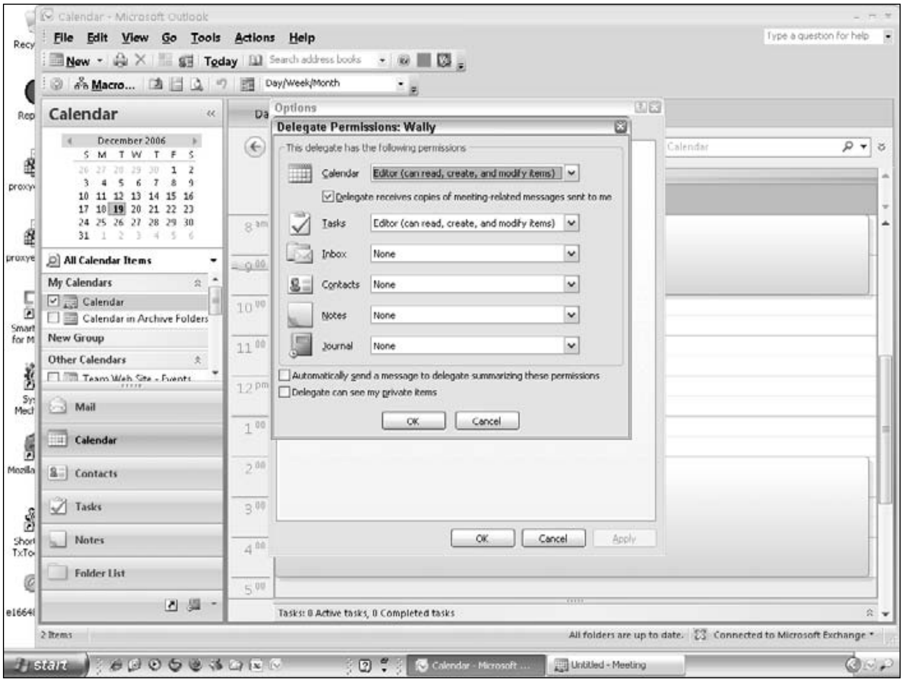


To remove or modify a delegate, display the Delegates tab as just described. Select a delegate in this list and then do one of the following:

- Click Remove to remove the delegate.
- Click Permissions to view and change the delegate's permissions.
- Click Properties to see information about the delegate.

FIGURE 28.24

Specifying permissions for a new delegate.



Working as an Assistant

If you have been granted delegate permission to another user's folders, you will be able to open and use them according to the specific permissions you have.

Opening Another User's Folder

To open a folder to which you have been granted permission, follow these steps:

1. Select Open from the File menu, then select Other User's Folder. Outlook displays the Open Other User's Folder dialog box as shown in Figure 28.25.
2. Type the person's name in the Name box or click the Name button to select from a list of users.
3. Select the folder that you want to open from the Folder Type list.
4. Click OK.

At this point one of two things will happen: the folder will open, or Outlook will display an error message if you do not have the required permission to open the folder.

FIGURE 28.25

Opening another user's folder when you have delegate permissions.

Sending Email on Behalf of Another User

If you have been given delegate permission for another user's Inbox, you can send email on behalf of that person:

1. Create a new email message.
2. If necessary, display the From field by clicking the Show From button on the Options ribbon.
3. In the From field, type the name of the person on whose behalf you are sending the message.
4. Compose, address, and send the message as usual.

Scheduling on Behalf of Another User

If you have been given delegate permission for another user's calendar, you can schedule appointments and meetings on behalf of that person. All you need to do is open that person's Calendar folder as described earlier and then create the item as you normally would in your own Calendar folder.

When you send a meeting request on behalf of someone else, the message will appear to the recipient as having come from the calendar owner, not the assistant. When the message is opened, however, the header will reveal that the request was sent by the assistant on behalf of the calendar owner.

Granting Folder Access

Granting other users access to your folders is similar to delegation in some ways. The primary difference is that delegation permits other users to send items on your behalf whereas granting folder access does not. Folder access also provides a finer level of control over what people can and cannot do in individual folders.

To grant another user access to a folder, or to change access rights, right-click the folder and select Change Sharing Permissions from the context menu. Outlook opens the Properties dialog box for that folder with the Permissions tab displayed, as shown in Figure 28.26. Then:

- **To add permissions for a new user:** Click the Add button and select the user from the Add User dialog box.
- **To change permissions for an existing user:** Click that user in the list.

FIGURE 28.26

Defining sharing permissions for a folder.

The lower section of the Permissions tab lists the individual folder access options that you can set (although usually you will not set them individually, as explained later). They are

- **Read:** Select whether the user can read either full details of items in the folder or none.
- **Write:** Select whether the user can create items and/or subfolders. Also select whether the user can edit only items he owns (that is, items that person created) or all items in the folder.
- **Delete Items:** Specify which items the user can delete.
- **Other:** There are three options here:
  - **Folder Owner:** The folder owner has all permissions.
  - **Folder Contact:** A folder contact receives automated messages from the folder including requests from users for additional permissions and resolution conflict messages. This is a read-only setting and is set automatically based on other permission settings.
  - **Folder Visible:** Users can see the folder (but not necessarily its contents).

Setting Default Folder Permissions

Every folder has default permissions that apply to all users. Normally these are set to None, which means that all users can see the folder but can view or manipulate its contents. If you want to change the default permissions for a folder, display the Permissions tab in the folder's Properties dialog box, click Default in the Name list, and set permissions as desired.

Rather than setting folder permissions individually, you will almost always use one of the predefined permission levels available in the Permission Level list. These are, in order from least to most permission:

- **None:** User can see the folder but not view or manipulate items it contains.
- **Contributor:** User can create new items in the folder but not view or manipulate existing items or create subfolders.
- **Reviewer:** User can view existing items but not create, edit, or delete them or create subfolders.
- **Non-editing Author:** User can create new items and can read all items; he cannot edit or delete any items or create subfolders.
- **Author:** Same as Editing Author with the addition of the ability to edit items he owns.
- **Publishing Author:** Same as Author with the addition of the ability to create subfolders.
- **Editor:** User has all permissions except the ability to create subfolders.
- **Publishing Editor:** User has all permissions but is not the folder owner.
- **Owner:** User has all permissions and is the folder owner.

Using Remote Mail

The *Remote Mail* feature allows you to manage your email messages without downloading them from the Exchange server. You connect to the server and download just the message headers, then disconnect. You can then review the message headers at your leisure and decide which ones you need to download in their entirety. Other messages remain on the server. Remote Mail is particularly useful when using a slow connection or if you receive messages with very large attachments. It is also handy when a corrupted message aborts the normal download process — you can view the corrupted message's header and delete it from the server.

To use Remote Mail, you must be using Outlook with an Offline Folders File.

Remote Mail and Exchange Versions

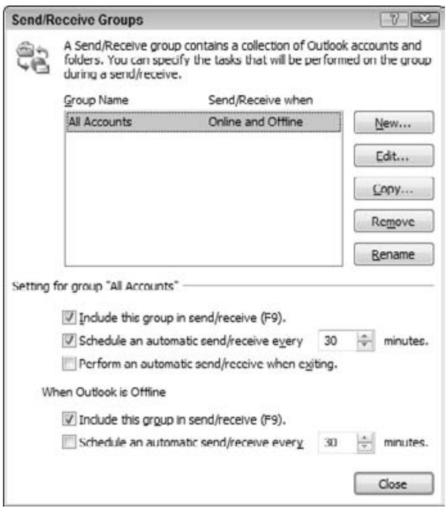
Exchange Server 2003 and later versions handle Remote Mail somewhat differently than earlier versions. With earlier versions, Remote Mail is available only if you are working offline. When you are online, the related commands are not available. Exchange Server 2003 and later also let you preview the first few lines of a message before downloading the entire thing.

To use Remote Mail, Outlook must be configured so that it does not perform automatic send/receives, which would download all the messages, not just the headers, and would defeat the purpose of Remote Mail. To check this:

1. Select Options from the Tools menu to open the Options dialog box.
2. Click the Mail Setup tab.
3. Click the Send/Receive button to open the Send/Receive Groups dialog box (see Figure 28.27).
4. Uncheck all three of the options related to automatic send/receive.

FIGURE 28.27

Setting automatic send/receive options.



Then, you download headers by opening the desired folder (usually the Inbox) and selecting Send/Receive from the Tools menu and from the next menu selecting Download Headers in This Folder. Once the headers are downloaded, they are displayed in the folder and you can preview each message as shown in Figure 28.28.

Other Remote Mail–related commands are also found on the Send/Receive menu, including marking and unmarking headers and downloading marked messages.

Using Remote Mail on a LAN

When you connect to Exchange using a LAN, Remote Mail does not make a lot of sense because even if you use the Download Headers command to download headers for a folder, the full items will be downloaded automatically shortly thereafter. Of course, with a fast LAN connection there is rarely any reason to use Remote Mail, but there are two ways you can force it.

The first is to put Outlook into offline mode by clicking the connection status indicator at the bottom right of the Outlook window and selecting Work Offline from the menu (see Figure 28.29). When you are finished using Remote Mail, repeat the same steps to unselect Work Offline.

FIGURE 28.28

Previewing a message with Remote Mail.

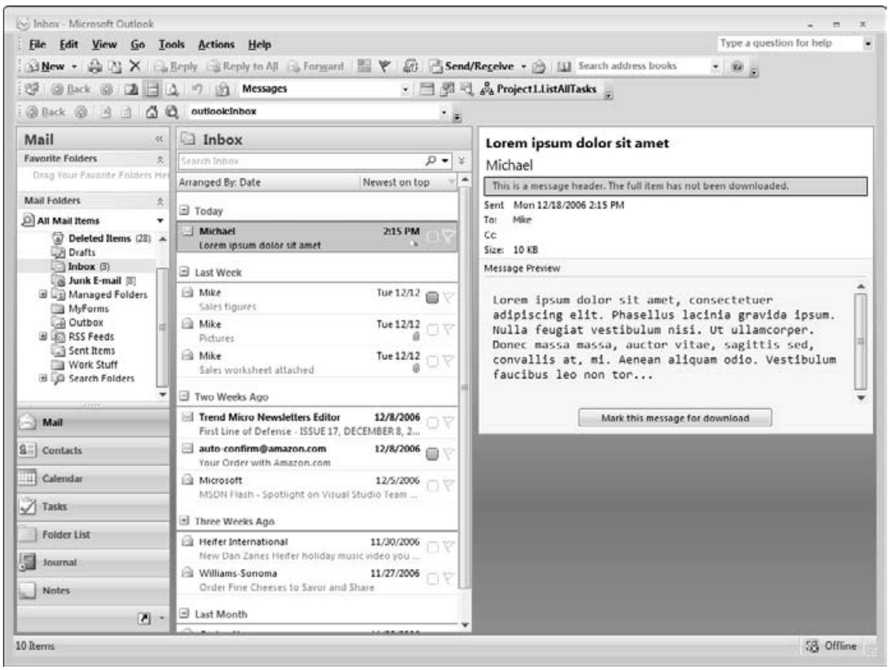
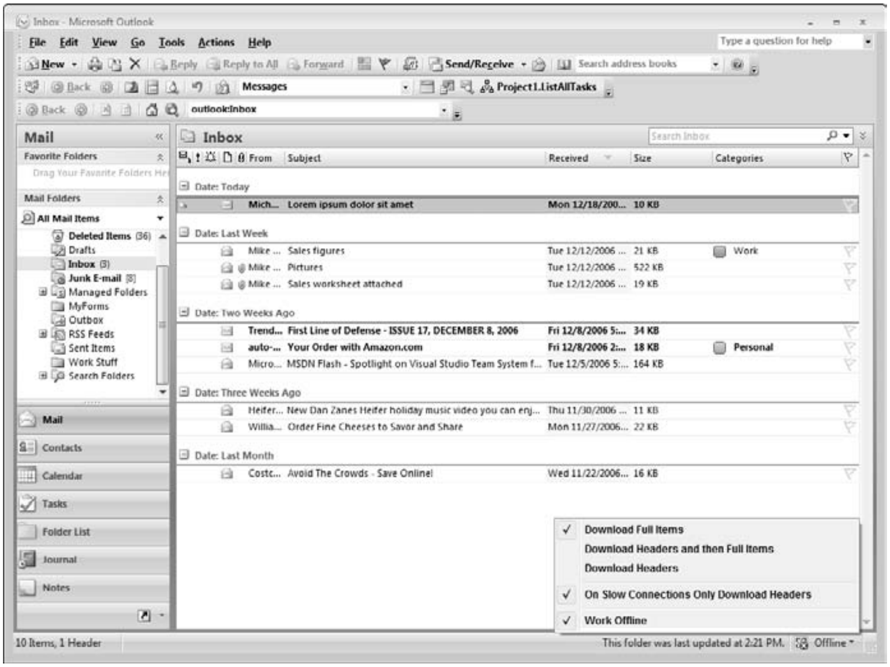


FIGURE 28.29

Working offline when using a LAN to connect to Exchange.



The other approach is to use the same menu shown in Figure 28.29 and select the Download Headers option for how Cached Exchange Mode synchronizes the server with the Offline Folders File. The available options are

- **Download Full Items:** Complete items, including attachments, are synchronized.
- **Download Headers and Then Full Items:** All headers are downloaded after which the full items are downloaded.
- **Download Headers:** Only the message headers are downloaded.
- **On Slow Connections...:** If Outlook detects a slow connection to Exchange, it downloads only headers. On fast connections the selected option is applied.

Summary

The combination of Outlook and Exchange Server provides you with unprecedented power and flexibility when you are working with a group of people. This chapter covered the details of setting up Outlook to work with Exchange and using the various tools available.

Chapter 29

Using Outlook with SharePoint Services

Microsoft SharePoint Services is designed to allow you to share your Microsoft Office information with others. This includes Outlook information as well as documents from Word, Excel, and other Office applications. SharePoint Services is relatively easy to install and use and, as a result, has achieved a good deal of popularity.

This chapter covers the details of using a SharePoint Services installation with Outlook. It does not deal with the other Office applications, and assumes that you have an existing SharePoint Services account — it does not cover installation or administration of SharePoint Services itself.

IN THIS CHAPTER

Understanding SharePoint Services

SharePoint Services, or *SPS*, provides a remote location, or server, that you can access over the Internet. Sometimes people refer to this type of service as a *portal*. It is designed for collaboration and document management within a team. Typically, each team within an organization will have its own SPS portal. When you have access to SPS, you can do a variety of things, such as:

- Share Office documents
- Participate in threaded discussions
- Share lists of important information, such as contacts

SharePoint Portal Server

A closely related product is *SharePoint Portal Server*, which is in essence SharePoint Services on steroids. Whereas SPS is designed for workgroup-level collaboration, SharePoint Portal Server has the power for enterprise-wide collaboration by permitting the creation of multiple SPSs — such as sites for the individual workgroups and departments and then linking them together. If you are using SharePoint Portal Server instead of SPS, many of the concepts and techniques presented in this chapter will still be applicable.

One thing that SPS does not do is email. Though SPS can be configured to send email notification messages to users, it does not act as an email client that lets you receive and send email messages yourself. Note, however, that some service providers bundle standard POP/IMAP or Exchange email accounts with SharePoint Services hosting.

Working with Shared Contacts

One of the features of SPS is the ability to share contacts. SPS can maintain a shared contacts list that lets all team members access those contacts that are needed for the team to operate. This shared contacts list can interact with your Outlook contacts in various useful ways.

Viewing Shared Contacts

To view the shared contacts list on your SPS server, log in to the SPS site using your web browser. On the left, click the Contacts link under Lists, as shown in Figure 29.1. Your browser displays the shared contacts list as shown in Figure 29.2.

SharePoint Services Permissions

When the SPS administrator creates your account, he will give you certain permissions that will determine what you can do on the site. You may be limited to viewing information, or you may have more extensive permissions that allow you to edit and delete items. Some of the actions described in this chapter may not be available to you depending on your permissions level.

FIGURE 29.1

Accessing shared contacts on an SPS site.

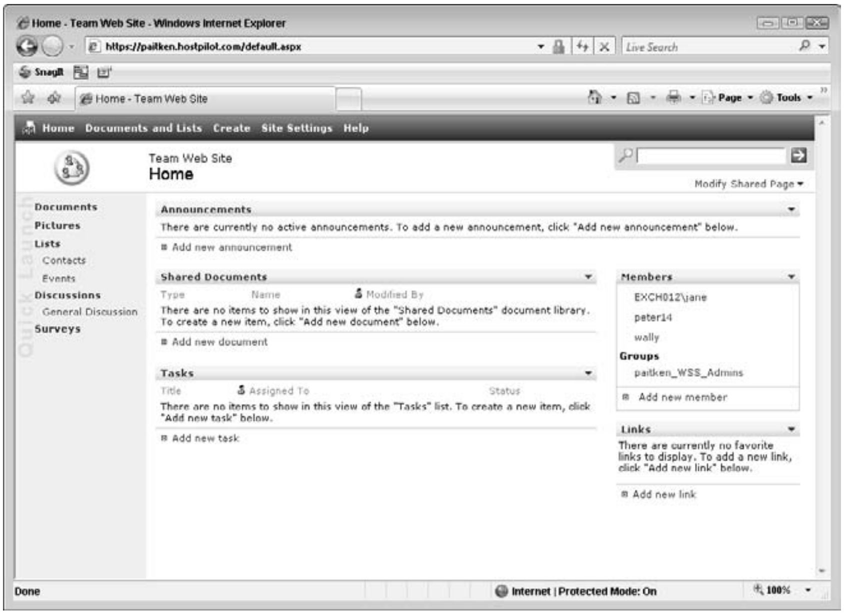
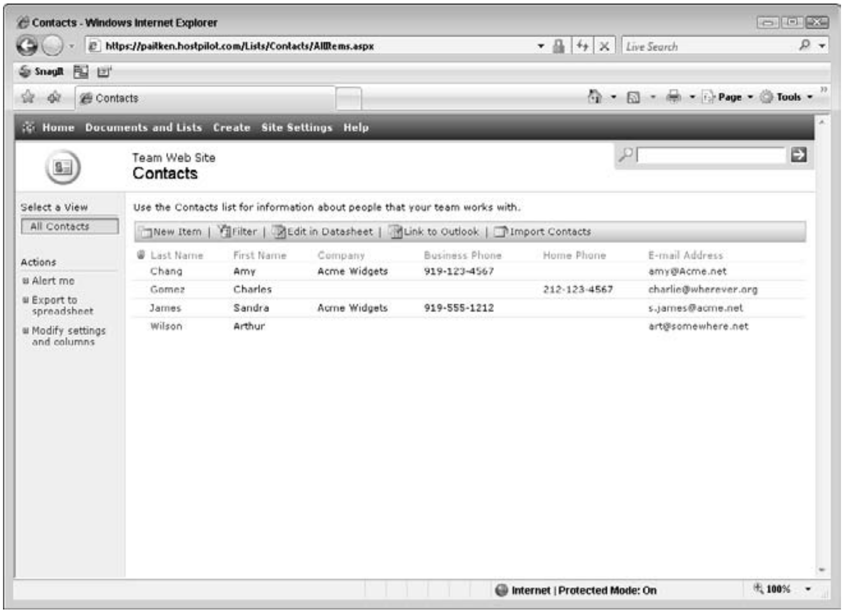


FIGURE 29.2

The shared contacts list.

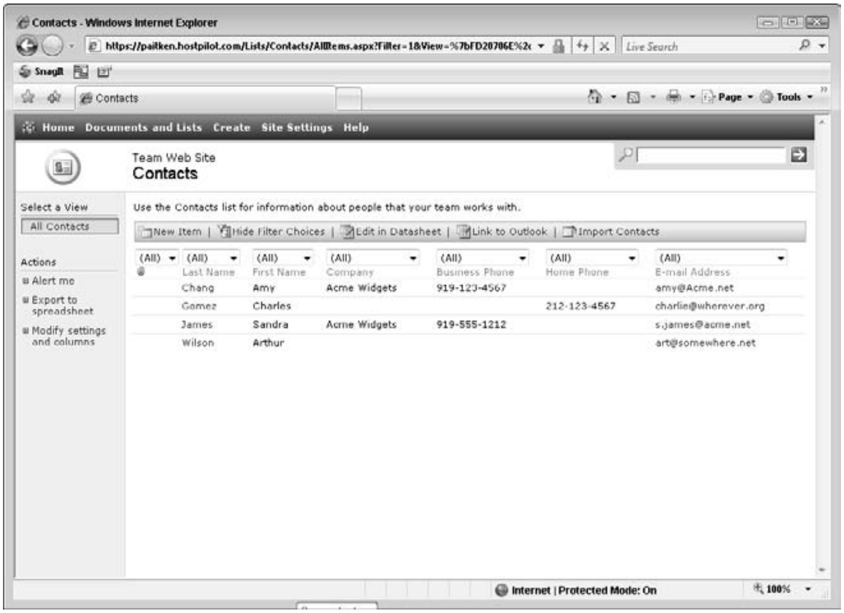


When this list is displayed, you can take the following actions by clicking the buttons at the top of the list:

- **New Item:** Opens a form where you can add a new contact to the list.
- **Filter:** Displays drop-down lists at the top of each column (see Figure 29.3) that let you filter the contacts list to display only certain entries.
- **Edit in Datasheet:** Displays the entire list in a datasheet format where you can edit multiple entries at once.
- **Link to Outlook:** Lets you link the shared contacts list to your local Outlook address book. This is explained in more detail later.
- **Import Contacts:** Lets you import contacts from a local Outlook address book to the shared contacts list.

FIGURE 29.3

Filtering the shared contacts list.



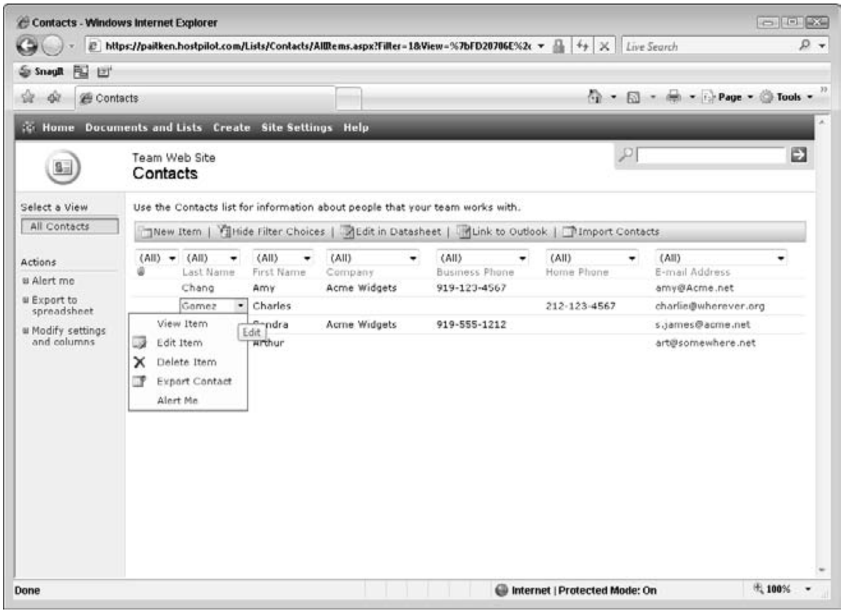
To send an email to a person on the shared contacts list, click the person's email address in the list. A new message form is displayed, addressed to that person. Complete the message and send it as usual.

You can also take the following actions in the shared contacts list by resting the mouse cursor over a contact's last name to display an adjacent down arrow. Click the arrow to select from the following actions (see Figure 29.4):

- **View Item:** View all details for this contact.
- **Edit Item:** Edit this contact's information.
- **Delete Item:** Delete this contact.
- **Export Contact:** Exports the contact's information as a VCF file, which you can then import into your Outlook address book.
- **Alert Me:** Displays the page shown in Figure 29.5 where you can set up an alert that will notify you by email when the item is changed.

FIGURE 29.4

Actions available for a contact in the shared contacts list.



Linking the Shared Contacts List to Outlook

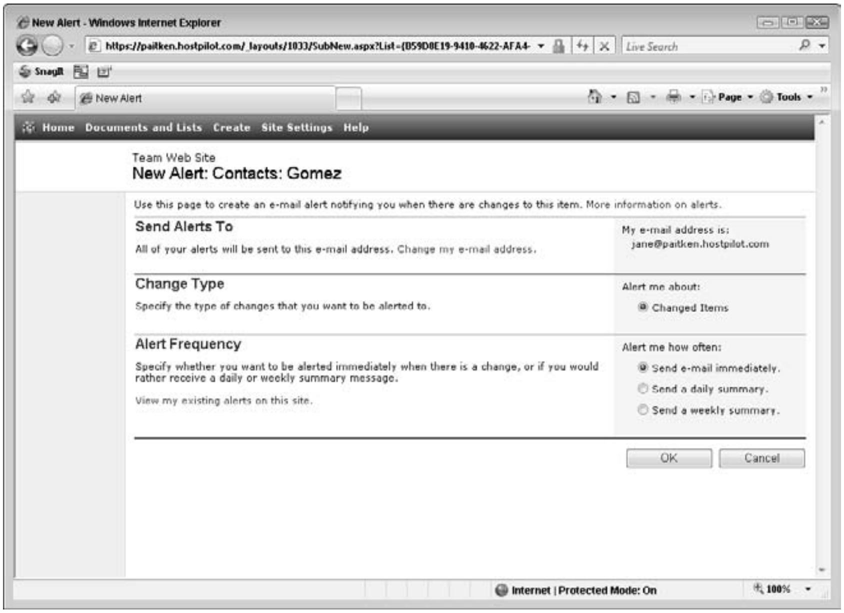
If you use the shared contacts list frequently, you may want to have these contacts available in your Outlook address book rather than having to go to the SharePointSPS site each time you need an address from the list. Of course you can export individual contacts to Outlook as described in the previous section, but you may find it easier to link the shared list to your local Outlook address book.

To create the link, click the Link to Outlook button at the top of the shared contacts list. Outlook warns you about linking only to lists from trusted sources. Click Yes to create the link, or click the Advanced button to set advanced linking options (these rarely need to be changed).

Once the link is established, the shared contacts list will be available in Outlook as a separate address book. It is read-only — you have to go to the SharePointSPS site to make new entries or edit existing ones. Changes that are made to the shared list are reflected in your local linked copy.

FIGURE 29.5

Setting up an alert for changes to a shared contact.



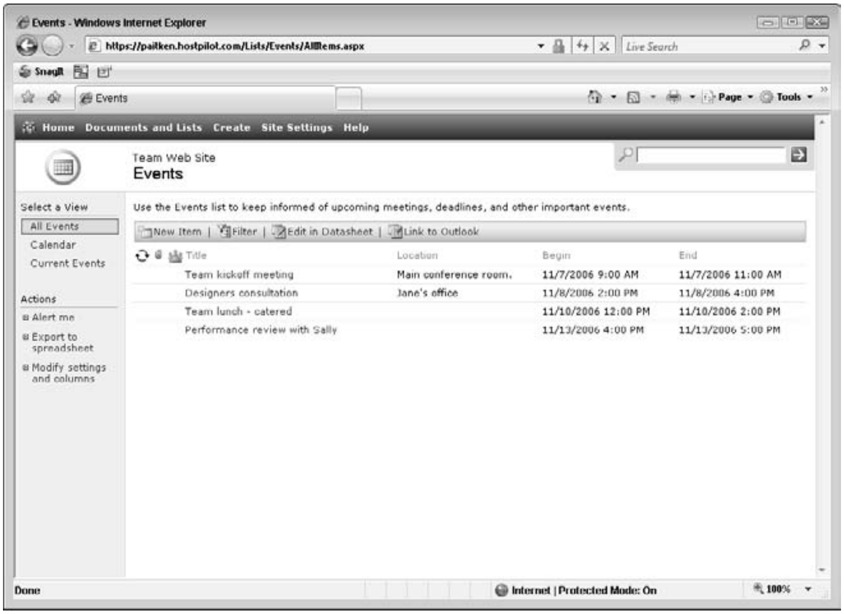
Working with the Shared Calendar

SharePointSPS supports a list called *Events*, which is a calendar used to maintain a schedule of events the entire team needs to know about. You access the Events list by clicking the Events link on the left side of the SharePointSPS home page. The default event display, which is called All Events, is shown in Figure 29.6. It lists all events in order with the title, location (if specified), and start/stop date and time. Two other views can be selected using the links on the left:

- **Calendar:** Displays events on a traditional calendar display that can show a single day, a week, or a month at a time.
- **Current Events:** Displays, in list format, only those events that are in the near future.

FIGURE 29.6

The default Events list display.



You can take various actions with the Events list by clicking the buttons at the top of the list or the links at the left:

- **New Item:** Adds a new event to the list.
- **Filter:** Defines a filter to display only certain events.
- **Edit in Datasheet:** Displays the list of events in a datasheet where you can edit multiple events at one time.
- **Alert Me:** Lets you define an email alert that will be sent to you when the Events list changes.
- **Export to Spreadsheet:** Exports a Microsoft Excel Web Query file that lets you view the event list in a linked worksheet.
- **Modify Settings and Columns:** Opens a page where you can set options for how the Events list is displayed.

Linking a Shared Calendar to Outlook

If you want to be able to view the shared events calendar without going to the SharePointSPS site, you can link it to Outlook. Then it is available like any other calendar in Outlook, although it is read-only. Changes to the shared Events list are automatically reflected in the local Outlook version.

To create the link, click the Link to Outlook button at the top of the Events list. Outlook warns you about linking only to lists from trusted sources. Click Yes to create the link, or click the Advanced button to set advanced linking options (these rarely need to be changed).

Working with Alerts

You have seen, earlier in this chapter, how you can configure SharePointSPS to send you an email alert whenever a contact or the Events list has changed. You can also configure SharePointSPS to send alerts when other kinds of documents are changed, although this is beyond the scope of this chapter.

Once an alert has been set up on the SharePointSPS site, and you have received at least one alert in Outlook, you can manage alerts from within Outlook. Here are the steps to follow to create a new alert:

1. Open the Inbox or any other mail folder.
2. Select Rules and Alerts from the Tools menu to display the Rules and Alerts dialog box.
3. If necessary, click the Manage Alerts tab (see Figure 29.7).
4. Click the New Alert button to open the New Alert dialog box (see Figure 29.8).
5. Expand the Source Currently Sending Me Alerts branch. You should see the SharePointSPS web site listed there.
6. Click the SharePointSPS web site link to open the SharePointSPS site's New Alert page in your browser (see Figure 29.9).
7. Select the list or document for which to set the alert.
8. Click Next.
9. Specify the type and frequency of the alert.
10. Click OK to complete the alert definition.

FIGURE 29.7

Managing alerts from within Outlook.

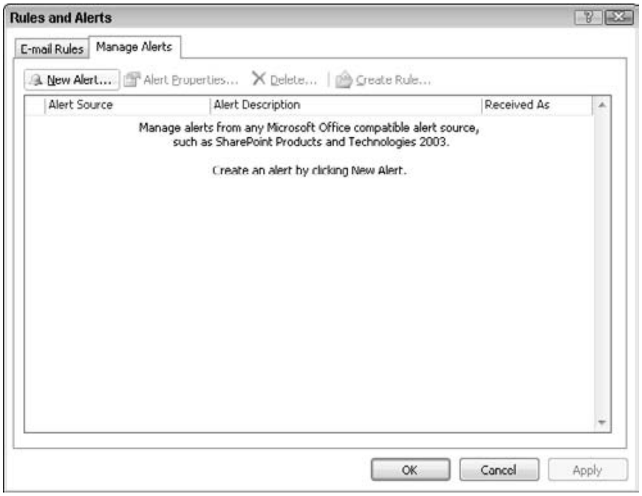


FIGURE 29.8

Selecting the source for a new alert.

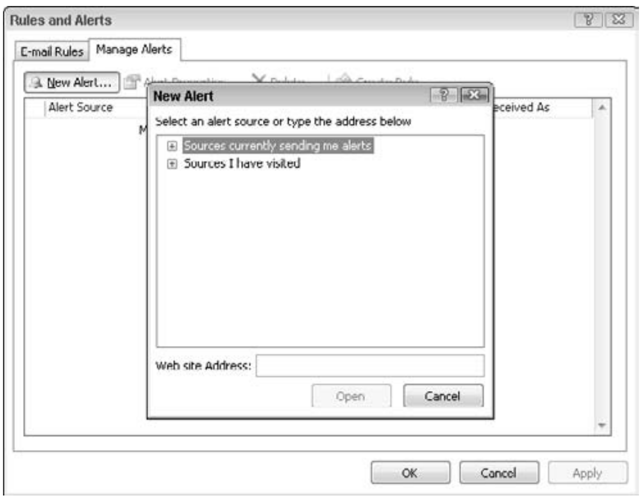
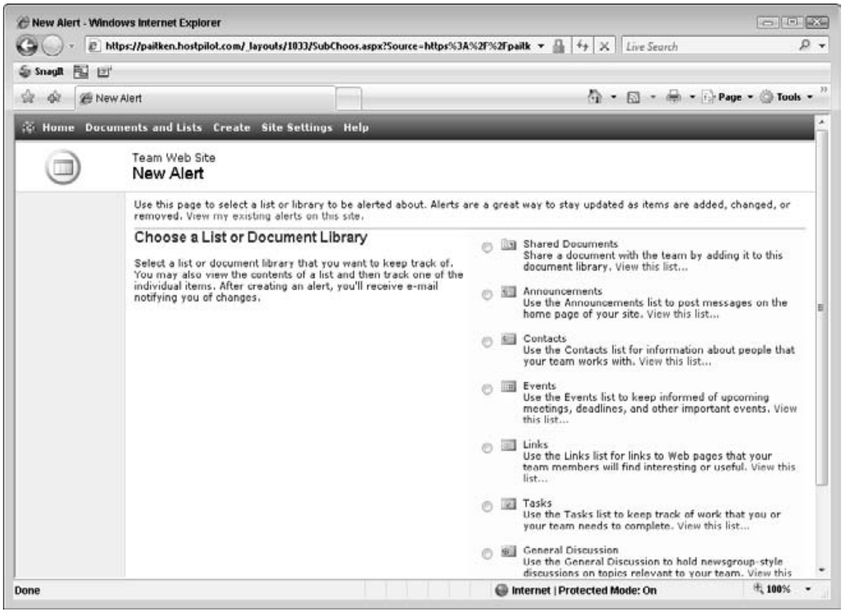


FIGURE 29.9

Defining a new alert.



After the alert is completed you can continue working on the SharePointSPS site or close your browser.

You can also modify and delete alerts from within Outlook:

1. Display the Manage Alerts tab as described earlier. This tab lists the alerts you have defined.
2. Click the alert of interest.
3. Click the Delete button to delete the alert. Click the Alert Properties button to go to the SharePointSPS site where you can modify the alert.

Summary

SharePoint Services is an easy-to-use portal that permits members of a team to share documents and other information such as contacts and an events calendar. Some of the SPS features integrate with Outlook, helping you to get the most out of both of these tools.

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